

# Ecclesiastical Departments Policies

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# Human Resources

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## Our Standards of Conduct

### And Other Human Resource Policies

Employees, Church-service Missionaries and Other  
Volunteers

of Legal Entities Affiliated with

The Church of Jesus Christ of Latter-day Saints

**\*\*Section 1, Our Standards of Conduct, applies globally. However, sections 2 through 9 are United States specific. For Area-specific policies, contact your HR representative.\*\***

## 1. Our Standards of Conduct

### Statement of Purpose

The Lord has promised His people that “inasmuch as [ye] are faithful, and exercise faith in me . . . ye shall obtain power to organize yourselves according to the laws of man” so that others “may not have power over you” and, significantly, that “you may be enabled to keep my laws.” (Doctrine & Covenants 44:2, 4-5) The Articles of Faith also provide: “We believe in . . . obeying, honoring, and sustaining the law.” (Articles of Faith 1:12)

It is essential that those who act on behalf of the Church – wherever they may be – obey, honor and sustain the laws that apply to them. As the Lord has assured us, “he that keepeth the laws of God hath no need to break the laws of the land.” (D&C 58:21) We should let integrity be our standard, obey the laws of the lands in which we operate and be ethical and honest in all our dealings. As we do so, we will receive the Lord’s protection and help in furthering His work.

Our Standards of Conduct has been developed as Section 1 of the Human Resource Policies so, by following the standards described, we might better be entitled to the Lord’s protection and help. We ask you to read and understand Our Standards of Conduct from beginning to end. These principles, while in some instances going beyond the requirements of the law, represent minimum standards of conduct for all who act

on behalf of Church-affiliated entities. These standards apply to all who have responsibility for the Church’s ecclesiastical or temporal activities, including General Authorities, Area Seventies, general Church officers, Church employees and Church-service missionaries and other volunteers in a workplace setting.

We recognize that no written set of standards can anticipate and give direction for every situation that may arise. Indeed, the Savior himself declared that “it is not meet that I should command in all things . . .” (D&C 58:26) We ask that in every situation you do the right thing – always.

As we do this together, the Lord will bless and magnify this work.

Sincerely,

The Human Resource Committee

### 1.1 Overview

This first section of the Human Resource Policies sets out and explains Our Standards of Conduct (“Our Standards”). In many cases, the policies in this first chapter are explained in greater detail in later chapters. You may think of Our Standards in this simple way:

Ask before acting:

- Is the action I plan to take legal?
- Is the action consistent with Church policy?
- In my conduct, am I being fair and honest?
- How would my action be viewed by those outside the Church?

Remember these rules:

- Learn the legal and Church standards and policies that apply to you.
- Ask if you are ever unsure what the right thing to do is.
- Follow Our Standards.
- Report if you have a concern or believe someone is

violating Our Standards.

In summary:

- There is no right way to do a wrong thing.
- It is wrong to do a right thing in a wrong way.
- Do what is right; let the consequence follow.

## 1.2 Introduction

### Who Must Follow Our Standards of Conduct?

The Church of Jesus Christ of Latter-day Saints operates and conducts its affairs through legal entities, such as Corporation of the President of The Church of Jesus Christ of Latter-day Saints and Corporation of the Presiding Bishop of The Church of Jesus Christ of Latter-day Saints, that have been organized in accord with the laws of various countries where the Church is present. Throughout this document, we use the term “the Church” to mean the Church and its legal entities. We use the term “Church Workers” to mean General Authorities, Area Seventies, general Church officers, Church employees and Church-service missionaries and other volunteers in a workplace setting.

Our Standards apply to all Church Workers, unless specifically noted, wherever located.

### What Are the Scope and Purposes of Our Standards?

Our Standards are minimum responsibilities Church Workers are expected to fulfill, both in letter and in spirit. These responsibilities include abiding by applicable legal requirements and demonstrating the highest principles of ethical conduct – regardless of whether those requirements or principles are spelled out in Our Standards. Church Workers should also comply with other Church policies, such as human resource, finance and computer usage policies. Ignorance of Our Standards does not excuse you from compliance.

No one has the authority to approve illegal or unethical acts by anyone acting on behalf of the Church. If you are faced with this situation, speak up.

### Do Our Standards Apply in Different Countries?

Our Standards, including our commitment to obey the applicable law, apply in every country – regardless whether others obey that law. Church Workers may be

subject to different laws in different countries, as well as laws of the United States that may apply to Church operations globally. Each of us has an important responsibility to know and follow the relevant laws that apply where we work.

### What Happens If I Violate Our Standards or the Law?

Church Workers who violate the applicable law or Our Standards may be subject to corrective action, including termination from employment or involuntary release from missionary or volunteer service. Any violation of law is a violation of Our Standards. Failure to report a violation of Our Standards, retaliation against someone else for reporting a violation or cooperating in an investigation, or lying or withholding relevant information in making a report or in an investigation also violate Our Standards. Church Workers who commit criminal acts may also be subject to criminal prosecution. All Church Workers are expected to cooperate fully in authorized internal and external investigations of potential violations of Our Standards.’

## 1.3 Asking Questions and Raising Concerns

The Church can only live up to its commitment to act with integrity if Church Workers speak up. You should speak up if:

- You are unsure about the proper course of action and need advice.
- You believe someone acting on behalf of the Church is doing, has done or may do something unlawful or that violates Our Standards.
- You believe you may have been involved in misconduct, even inadvertently.

Each of us should report violations of Our Standards (even if the violation is motivated by a misguided attempt to benefit the Church) by anyone (regardless of their position). Good intentions do not justify improper conduct. If you do not report a violation, you could be held accountable and subject to corrective action, even though you were not involved in the original violation.

### Whom Should I Contact for Help or to Raise a Concern?

If you have a question about how to act ethically and appropriately in a particular situation, ask. Normally,

address your questions to your supervisor first. If your supervisor cannot answer your question, you may consult with your supervisor as to whom to contact for assistance. If you feel you cannot speak with your supervisor, you may also contact the human resource (“HR”) manager for your department or area, the Director, HR Legal Services & Standards Officer at Church headquarters, the Managing Director or the Director for Temporal Affairs for your department or area, the Church Auditing Department or the Standards Line described below. When questions arise about the laws that apply to our activities, ask the Office of General Counsel (“OGC”), including the Area Legal Counsel for your area.

Members of management who receive reports of apparent misconduct should contact the Standards Officer or the Standards Line regarding how to proceed.

### **What Is the Standards Line?**

At any time, even if you already have asked a question or raised a concern with the contacts suggested above, you may contact the Standards Line:

- If you are located in a European Union Member Country: <https://standardslineeu.alertline.com>
- If you are located in Spain or Portugal: <https://standardslinesp.alertline.com>
- If you are located anywhere else in the world: <https://standardsline.alertline.com>
- By telephone at the number of the country from which you call: <https://home.ldschurch.org/HRDdept/Pages/Standards-of-Conduct.aspx>

Where applicable laws allow, (most countries) your contact may be anonymous if you desire. The Standards Line is operated under OGC’s direction. Reports will be investigated appropriately. Prompt action, as dictated by the facts, will be taken. If appropriate, you will be notified of the resolution of your report. For more information about the Standards Line, please refer to the Standards Line website above.

### **No Retaliation**

Church Workers who in good faith lawfully and

truthfully seek advice or report, including by contacting the Standards Line, or participate in an investigation of any apparent violation of Our Standards, or who seek protection under applicable laws, must not be subjected to any form of retaliation. Any Church Worker who engages in retaliation will be subject to corrective action, including termination from employment or involuntary release from missionary or volunteer service.

## **1.4 Personal Conduct and Our Workplace**

### **Qualified Applicants Considered for Employment**

Only members of the Church who are worthy of a temple recommend qualify for employment. Apart from this, the Church is an equal opportunity employer and does not discriminate in its employment decisions on any basis that would violate U.S. or local law. Qualified applicants will be considered for employment and employees will be considered for advancement or other job-related benefits without regard to race, national origin, color, gender, pregnancy, marital status, age, disability, genetic information, veteran status, or other legally protected categories that apply to the Church. The Church will make reasonable accommodations for qualified individuals with known disabilities, unless doing so would result in an undue hardship to the Church.

### **Temple Worthiness**

As a Church Worker, you must either hold a current temple recommend or be certified by your bishop or branch president as worthy of holding a temple recommend. This standard has many benefits:

- Church Workers who live the Church’s teachings are more likely to support its mission at work.
- Church Workers who share common values can maximize unity and teamwork and improve communication among themselves, members and leaders.
- Church Workers who sustain the leaders of the Church are more likely to support the work-related policies established by those leaders.
- Church Workers who live the Church’s teachings better represent the values and reputation of the Church to individuals and organizations who deal

with the Church.

- Church Workers who believe the Church's teachings and have a testimony of God the Eternal Father and His Son, Jesus Christ, are more likely to pray sincerely for and receive assistance in their work responsibilities.

A Church Worker who ceases to be worthy of a temple recommend, for whatever reason, may be subject to corrective action, including termination from employment or involuntary release from missionary or volunteer service.

Church Workers must establish worthiness to hold a temple recommend at regularly scheduled intervals and on an as-needed basis. Bishops or branch presidents may be contacted for those Church Workers who do not hold or show on request a current temple recommend.

### **Highest Level of Integrity and Conduct**

Church Workers represent the Church at all times – not just during business hours. Consequently, Church Workers must demonstrate the highest level of integrity and conduct at all times, whether at or away from work. Conduct at work or elsewhere that is detrimental to the reputation of the Church, whether or not it results in the loss of a temple recommend, may result in corrective action, including termination from employment or involuntary release from missionary or volunteer service.

Church Workers must avoid viewing pornography. Those who view, attempt to view or distribute pornography at work, on Church property, or anywhere using Church-provided technology (as defined in the Technology Use policy), will be terminated from employment or involuntarily released from missionary or volunteer service. Those who view, attempt to view or distribute pornography away from work may be subject to corrective action.

Any Church Worker who is under the influence of alcohol or drugs at work is subject to immediate termination from employment or involuntary release from missionary or volunteer service. Church Workers who use or distribute substances prohibited by the Word of Wisdom, even away from work, may also be subject to corrective action.

### **No Discrimination or Harassment**

Each of us has a responsibility to maintain a workplace that fosters mutual respect. Discrimination and/or harassment in any form, and sexual harassment in particular, are prohibited. Specifically, the Church prohibits discrimination and/or harassment that is sexual or related to race, national origin, color, gender, pregnancy, marital status, age, disability, genetic information, veteran status, or any other legally protected categories that apply to the Church. Church Workers should not harass, threaten, or degrade any person.

Harassment may include words, gestures, or actions that annoy, alarm, or abuse another person or create an intimidating, hostile, or offensive working environment. Harassment also includes derogatory or degrading remarks, slurs and inappropriate jokes and epithets.

Sexual harassment includes unwelcome sexual advances, requests for sexual favors and any other verbal, non-verbal or physical conduct of a sexual nature, when submission to that conduct is a term or condition of employment, affects employment decisions, unreasonably interferes with a person's work performance or creates a hostile or offensive work environment. Examples include but are not limited to:

- Verbal conduct such as talking about sex or sexual feelings, telling sexual jokes or stories, asking personal questions about dating or sexual life, making sexual comments or innuendoes, whistling or making other suggestive sounds, repeatedly asking for dates or other personal attentions.
- Nonverbal conduct such as displaying or emailing materials with sexually suggestive words or pictures, making sexual gestures, giving items of a sexual or personal nature, staring at a person's body or clothing, leering, looking a person up and down, blocking a person's path, hindering a person's movement, or standing closer than appropriate.
- Physical conduct such as kissing, hugging, or massaging another person or intentionally touching another's body, clothing, or hair.

If you feel you have been discriminated against or harassed, you should immediately report the incident to

your supervisor. If you believe your supervisor is involved in the alleged misconduct or you are otherwise uncomfortable reporting your concern to your supervisor, you may instead report the incident to any other manager in your department or area, the HR manager for your department or area, the Standards Line, or the Director, HR Legal Services & Standards Officer. You are encouraged to report immediately any incident of discrimination or harassment you witness. Although not required, you are encouraged to tell the person engaging in the discriminating and/or harassing conduct that it is unwelcome, offensive and should stop at once.

A supervisor who learns of an alleged incident of work-related discrimination or harassment involving a Church employee (including an incident when the alleged discriminator or harasser is not a Church employee) must immediately report it to the HR manager for the department or area, who in turn must report it to the Standards Line or the Director, HR Legal Services, even if the employee who is the alleged victim requests that it not be reported. A supervisor who fails to report in this way may be subject to corrective action.

The Church will investigate all reports appropriately, as confidentially as possible and will take prompt action, up to and including termination from employment or involuntary release from missionary or volunteer service, against any Church Worker found to engage in discrimination and/or harassment. Any Church Worker who knowingly makes a false claim will be subject to corrective action. If appropriate, you will be notified of the resolution of your report.

### **Applicants and Employees with Disabilities**

The Church complies with applicable laws regarding applicants and employees with disabilities, such as the Americans with Disabilities Act ("ADA") in the U.S. In its application and interview process, the Church affords equal opportunity to and makes reasonable accommodation for all persons with a disability who meet the skill, experience, education and other requirements of the desired position. Qualified persons with a disability will have the opportunity to explain or demonstrate the ability to perform the essential functions of the desired position.

As needed, the Church will make reasonable

accommodations for qualified applicants or current employees with a disability who receive an offer so they may perform the essential functions of the job, provided this does not result in an undue hardship to the Church. The Church will also make reasonable accommodations to current employees who become disabled, as long as they can still perform the essential functions of the job.

Employees desiring an accommodation should ask the HR manager for their department or area, who will ask the employee to complete a request form and refer the request to the ADA Committee to determine if the employee qualifies under the ADA and, if so, whether a reasonable accommodation can be provided. This committee will consider and approve, modify, or disapprove accommodation requests. Supervisors should not grant or deny requests for accommodation but should instead refer such requests to the department HR manager.

### **No Workplace Violence**

The Church will not tolerate violence in the workplace. Any Church Worker who engages in or threatens workplace violence is subject to corrective action, including termination from employment or involuntary release from missionary or volunteer service. Workplace violence includes physically harming another, brandishing weapons, shoving, pushing, fighting, hitting, biting, kicking, threatening gestures, intentionally damaging anyone's property at work, or the Church's or a Church Worker's property anytime, stalking, excessively visiting, calling or emailing another Church Worker, any other intimidating, coercing or deliberate, unwelcome conduct, threatening or talking of engaging in any of these activities and any other threatening behavior.

No one except authorized law enforcement personnel may have a weapon on Church property or carry a weapon while performing services for the Church. Weapons include guns, knives, explosives and other items designed to inflict bodily harm.

Church Workers who feel threatened by another person in connection with their work, or who witness any workplace violence or violation of this policy, should immediately report the incident to their supervisor or the HR manager for their department or area, the Standards Officer, the Managing Director or

the Director for Temporal Affairs for your department or area, the Church Security Department, or the Standards Line described above.

The Church will investigate all reports of a violation of this policy as confidentially as possible. Church Workers who violate this policy are subject to corrective action, including termination from employment or involuntary release from missionary or volunteer service. Any Church Worker who knowingly makes a false claim will be subject to corrective action. As appropriate, they will be notified of the resolution of your report. The Church may require a Church Worker who commits workplace violence to participate in counseling and submit a fitness for duty certificate from a health care professional, satisfactory to the Church, as a condition of continued employment or service and/or before allowing the Church Worker to return to the workplace.

### **Right to Monitor/Inspect**

The Church reserves the right to enter and inspect all work areas (including but not limited to offices, desks, cabinets, computer files, storage rooms and lockers) for any reason, with or without notice and whether or not the space has been secured by the Church Worker. The Church may also conduct audio and video surveillance of its premises where permitted by law.

The Church may monitor telephone conversations and text and e-mail communications at work or on Church equipment, may retrieve voice and electronic messages in the process of monitoring customer service and may use the results to determine if any of its policies have been violated.

### **No Retaliation**

Employees who report or participate in an investigation of discrimination, harassment, workplace violence, any other policy under Our Standards, or who seek protection under U.S. or local laws governing employment and/or working conditions, must not be subjected to any form of retaliation. Co-workers must not retaliate against an employee who reports an incident of discrimination, harassment, or workplace violence.

## **1.5 Doing Business with Others**

### **General Guidance**

Church Workers should develop relationships with other parties, such as vendors, suppliers and other contractors (collectively referred to as “Contractors”), in fair, honest, lawful and ethical ways. Anything that would be improper for us to do ourselves is improper for someone else to do for us. For example, if it would be inappropriate for you to give a gift to a Contractor, it also would be inappropriate for you to ask someone else to give the gift.

### **Our Purchasing Practices**

Purchasing decisions, including selection of Contractors, should be based on the best value received by the Church by proper means. Contractors should be evaluated in fair and objective ways, such as obtaining competitive bids, verifying quality and service claims and confirming the contractor’s financial condition and adherence to honest business practices. Purchasing decisions should be properly approved. Purchases and other relationships with contractors should be by written agreement or order, setting forth clearly all necessary terms and conditions. Payments should be lawful, accurately recorded, traceable and consistent with the Church’s established financial policies.

## **1.6 Avoiding Conflicts of Interest**

### **General Guidance; Disclosure of Potential Conflicts**

You should not engage in any activity that creates a conflict of interest with your Church responsibilities. A conflict of interest arises when Church Workers either use their Church position or employment for personal or family gain or to further personal or family interests that are inconsistent with the Church’s interests. You should promptly report to your supervisor, by completing a Disclosure of Possible Conflict of Interest form, any situation that constitutes a potential or actual conflict of interest involving you or anyone else. Full, complete and immediate disclosure reduces the likelihood that potential conflicts will become actual conflicts and protects you from allegations that you acted improperly. You should complete the Disclosure of Possible Conflict of Interest form at defined intervals or whenever your circumstances change.

### **Financial Interest in a Contractor or Business with**

## **Conflicting Interests**

You should not participate in making, or attempt to influence, Church decisions regarding actual or potential Contractors or other third parties in which you — or a family member or a person with whom you have a close personal relationship — have any financial interest. For this purpose, “family members” include any parent, spouse, child, sibling, first cousin, niece, nephew, uncle, aunt, grandchild, grandparent, father- or mother-in-law, brother- or sister-in-law, son- or daughter-in-law and any step family member. Close personal relationships include dating, business, or financial relationships, or any other close personal friendship or joint interest an objective party could reasonably conclude might influence your judgment. A financial interest could include an investment or ownership interest (other than investments in securities commonly traded in the public markets) or an employment or consulting relationship.

### **Offices and Directorships; Outside Employment**

Before accepting a position as an officer, trustee or director of any legal entity, including nonprofit entities, you must advise your department or area HR manager, who may consult with OGC to determine if acceptance of such a position would constitute an unacceptable conflict of interest with the Church. The same procedure applies if you are asked to accept a public position or political appointment or if you decide to run for public office.

Second employment is a potential conflict of interest and must be disclosed on the Disclosure of Possible Conflict of Interest form. Second employment will not be considered an actual conflict of interest as long as the employee’s work schedule does not have to be adjusted to accommodate the second employment and the second employer is not a Church operating entity (Corporation of the President, Corporation of the Presiding Bishop, LDS Family Services, or other related entity throughout the world) or does not do business with Church operating entities. Employees are not permitted to maintain multiple, concurrent positions with Church operating entities. An employee should not receive compensation in addition to his or her normal pay for performing services for a different department, such as appearing in a movie production of the Audiovisual Department or performing translation services. Time

spent in rendering such services should be considered as hours worked in the primary department.

If an employee is in a position to influence the amount or nature of the business relationship between Employer and his or her secondary employer, the employee has an actual conflict of interest that must be disclosed and resolved.

Fully benefited employees may accept second employment with a Church-affiliated entity, such as Brigham Young University, Zion’s Securities, Bonneville International and Deseret Book, only if the second position is excluded from benefits.

Employees must be careful not to use Church facilities or equipment for second employment. Second employment must not be carried out during hours the employee works at his or her Church employment.

### **Receiving Gifts, Favors and Entertainment**

The receipt by Church Workers of gifts, favors and entertainment (collectively referred to as “Favors”) from Contractors, potential Contractors, or those whose interests may be affected by Church actions can create a conflict of interest. Favors include anything of value, including cash, gift certificates, discounts or favorable terms on purchases, loans, services, prizes, transportation, meals, entertainment or athletic event tickets, use of vehicles or vacation facilities, stocks or other securities, personal, home or office items, or home improvements. The potential list is nearly endless — these are just examples.

Church Workers should not request or hint for a Favor from contractors or others who seek to do business with the Church. Favors offered to Church Workers and their family members generally fall into either of two categories:

#### **Usually Permissible**

Favors from any one source in a calendar year with a combined market value less than \$100 (or other, lower established level for your country or area) are usually permissible, if lawful and not otherwise contrary to the interests of the Church. (This does not include a gift of cash or its equivalent in any amount, which is always wrong, as noted below.) Examples in the “usually permissible” category may include:



- Occasional, reasonable meals with a business associate even if Church business is not discussed.
- Sports, theater and other cultural events, when the giver accompanies you to the event.
- Discounts or other benefits offered by the Contractor to the public or to all of its customers.
- Common business gifts of nominal value such as promotional or commemorative items (pens, calendars, sweatshirts, candy, etc.). (Where practical, share such items with others in the office.)

### **Always Wrong**

You may never accept or request:

- Cash or cash equivalents (gift cards or certificates, loans, stock, etc.) in any amount.
- Any Favor that would be illegal or result in any violation of law.
- Any Favor with an understanding for you to do anything in return.
- Any Favor that is unsavory is sexually oriented or would reflect poorly on the Church.
- Any Favor you know or believe would violate the standards of the giver's employer.

If you are offered a Favor that does not clearly fit into one of these two categories, ask your area or departmental HR manager or your supervisor whether it is appropriate to accept it, or contact the Standards Line.

If you are offered a Favor that violates Our Standards, you should promptly inform your supervisor and your HR manager. Follow their direction in responding to the person who offered or gave the Favor to you. You should also promptly return any cash or cash equivalent. If you work in an area where offers of Favors inconsistent with Our Standards are common, you should inform all Contractors with whom you deal of the applicable Standards.

### **Use of Church Property, Facilities or Assets**

You should not use the Church's property, facilities or assets for personal benefit or financial gain. For

example, you should not:

- Engage, during your working hours, in business activities that are not a part of your assigned duties.
- Display merchandise, solicit co-workers, distribute literature or participate in fund-raising for personal interests (business, political, charitable or other) during work time or in work areas.
- Use Church-owned computers, copiers, phones, or other equipment for personal benefit or financial gain.

## **1.7 Avoiding Bribery, Kickbacks, Fraud and Other Misconduct**

Just as it is improper to accept Favors that may influence your work for the Church, you should not provide improper Favors to people who work for entities with which the Church interacts, such as governmental authorities or agencies or private Contractors. You must not provide any Favor — anything of value — as a bribe, “kickback” or other benefit designed to influence or compromise the conduct of the recipient. You also should not arrange to do it indirectly or allow anyone else to do it.

Examples of inappropriate Favors include:

- Giving any money, gift, loan, favor or thing of value to influence decisions or judgment.
- Giving a rebate, kickback or other Favor for obtaining favorable treatment for the Church.
- Providing improper Favors to a public official indirectly, such as by benefiting someone they suggest or with whom they have a close personal relationship.

The laws of the United States (applicable globally to Church activities) and of virtually all countries where the Church operates prohibit bribes or Favors to public officials. “Public officials” include government officers or employees, political candidates, political parties and their officials, employees of government-owned businesses and officials or employees of international organizations such as the United Nations or European Union. A violation of these anti-corruption laws is a serious criminal offense that can result in criminal prosecution, substantial fines and imprisonment,

damage to the good standing of the Church and termination from employment with the Church or involuntary release from missionary or volunteer service. Consult the Church's U.S. Foreign Corrupt Practices Act Guidelines, available on the Intranet and from OGC, for help in compliance in this regard.

You should immediately report a possible or actual violation relating to providing Favors to other persons in connection with Church matters.

## 1.8 Making Accurate Records and Reports

Our records, reports and other means of keeping information or providing it to others should be accurate and honest. Applicable document retention policies should be followed in retaining, discarding or destroying documents.

## 1.9 Protecting Property and Information

### Proprietary and Personal Information

The Church produces valuable ideas, strategies and other operational information that is not released to the general public ("Proprietary Information"). Such proprietary Information is owned by the Church and may be sacred or otherwise confidential. The Church protects this information from use by outsiders. Personal information is also confidential and privacy of such data may be protected by law. Examples of Proprietary Information are:

- Administration and operations information and strategies
- Growth and development information and projections
- Anticipated building plans for temples, meetinghouses and other Church facilities
- Financial information
- Personnel records
- Statistical and membership records information
- Research and technical data
- Intellectual property such as patents, trademarks (including key identifiers such as the Church's name and logo, The Book of Mormon and Liahona), service

marks and copyrights. (Policies relating to the use the Church's intellectual property are established by the Church's Intellectual Property Division ("IPD").)

- Trade secrets of any kind

You should protect the confidentiality of and the Church's legal interests in the Church's Proprietary Information. Only reveal Proprietary Information to another Church Worker who has a specific need to know to perform his or her work. Sharing Proprietary Information with a third party may only be done with management's approval, usually under a written confidentiality agreement or other arrangement approved by OGC or IPD. You may be required to sign a document acknowledging these obligations.

During the course of your employment with or service for the Church, you may generate work product such as written materials, plans, computer programs or codes, photographs, artistic creations, or inventions ("Work Product"). All Work Product is owned solely by the Church and should be returned at any time upon request or when you stop providing services for the Church, whichever first occurs. Each employee must sign a Confidentiality Agreement and Assignment of Work Products Agreement, which contains a definition of confidential information and sets forth the employee's obligation to not reveal such information except as may be required by the employee's job responsibilities. Employees should be diligent in safeguarding information entrusted to them so as to avoid even the accidental disclosure of confidential information.

### Use of Proprietary and Confidential Information and Intellectual Property of Others

We respect the proprietary and confidential information and intellectual property of others. Accordingly:

- Do not use any proprietary or confidential information (including computer records) from prior employers.
- Do not load any unlicensed software on any Church computer.
- Do not accept or use proprietary or confidential information of another except under an agreement approved by your management and IPD.

- Do not use the trademark or service mark of a third party, without approval of your management and the IPD.
- Do not use or copy copyrighted documents and materials (including computer software, audio, video and off-the-internet or off-the-air recordings) without written permission from the copyright owner. Virtually all movies, TV shows, books, magazines, comics, newspapers, etc. are copyrighted. Copying or using these materials without permission is a form of theft. If you have questions in regard to copying or use, ask IPD.
- Do not request an applicant's social security number, date of birth, or driver's license number ("Personal Information") until we have extended a job offer or requested from the applicant permission to conduct a criminal background check, credit history, or driving record check.
- Do not use Personal Information obtained during the hiring process for any reason other than determining whether we will hire the applicant as an employee. Prohibited uses include marketing, profiling, or reselling the information.
- Do not share confidential or Personal Information collected during the hiring process except with those you have a legitimate need to know it.
- Unless required by law, do not retain information collected about an applicant for more than 2 years if the applicant is not hired during the 2-year period. Destruction of Personal Information should be done in a secure manner that reasonably protects against public dissemination of the information.

## **1.10 Keeping Political Activity Personal**

The Church does not endorse or oppose any political candidates or parties. Church contributions, either direct or indirect, to political parties or candidates are illegal in most jurisdictions and prohibited by Church policy. As an individual you may participate in the political process and make voluntary contributions to candidates and political causes of your choice. In such political involvement, you should make clear you do not act or speak for the Church. You should not use Church resources, such as Church email and other

communication systems, for participation in any political campaign or process. You also should not engage in political activities during your Church work time or on Church property.

## **1.11 Responding to Government Inquiries or Investigations**

You should contact OGC promptly upon receiving a request from a government agency or official that either (a) is for Church Proprietary Information or (b) is not routine in nature. Any information provided to a governmental agency or official should be completely honest and truthful. Be sure that records relevant to the government inquiry are preserved.

## **1.12 Applying Additional Standards Relative to Global Operations**

### **Trade Restrictions and Export Controls**

The United Nations, the European Union and individual countries, such as the United States, may impose restrictions on dealings with certain countries, entities or individuals. Trade restrictions take many forms, including bans on transfer of goods, services or technology. Before having dealings with governments, financial institutions, firms or individuals that might be on the list of sanctioned countries, contact OGC.

### **U.S. Anti-Boycott Regulations**

You should not take any action, furnish any information or make any declaration that could be viewed as participation in an illegal foreign boycott of Israel or other countries. Illegal requests may be very subtle, such as requests regarding the nationality, national origin and/or religion of employees or representatives who will be sent to a country, or regarding the origin of goods being shipped, the origin of other parties in a transaction, or other similar terms.

OGC's Guidelines Concerning the U.S. Anti-Boycott Regulations, available on the Intranet, contains more detailed information. If you have questions, or if you receive a request to take action or give information that is boycott-related, notify OGC immediately.

### **Customs**

As a general rule, the importation into a country of

Church materials and products is subject to various customs fees and regulations, such as import duties, value added and excise taxes and the requirement to use the proper valuation of goods imported. If you are involved in this process, you should ensure that imports comply with these fees and regulations and that information provided to customs and tax officials, including the declared valuation of imported goods, is accurate and truthful. If you have questions, contact OGC before declaring a value.

### **1.13 Updating Our Standards**

The Church may change Our Standards of Conduct and other HR Policies over time in order to meet changing needs or requirements. Our Standards are not intended to create contractual or other legal obligations on the Church.

## **2. General Employment Policies**

### **2.1 Introduction**

Each Church Worker should review and is expected to follow Our Standards of Conduct and Other Human Resource Policies. Church Workers should direct any questions they may have about these policies to their supervisor or Human Resource representative. These policies may be changed from time-to-time at the discretion of the Human Resource Department. Our Standards of Conduct and Other Human Resource Policies do not imply any contractual rights. Instead, they represent principles to be followed by all Church Workers, including managers and supervisors. All previously issued Human Resource policies or codes of conduct and any inconsistent policy statements are superseded.

### **2.2 At-Will Employment**

The employment relationship is based on mutual respect and consent and continues only as long as both parties find the relationship to be satisfactory. Each employee is free to terminate his or her employment whenever the employee feels it is in his or her best interest to do so. Likewise, Employer has the right to terminate the employment relationship at any time, with or without cause. This is known as "employment at will." Nothing in Our Standards of Conduct and Other Human Resource Policies nor any other oral or written

statement to an employee may be viewed as creating or implying a contract of employment for any specific period of time. An agreement for employment for a specific period of time can be established only by a written document signed by both the employee and the human resource director for the department.

### **2.3 Advertising for and Recruiting Applicants**

The Human Resource Department will assist departments in filling job openings and recruiting qualified temple-worthy individuals without regard to race, national origin, color, gender, pregnancy, marital status, age, disability, genetic information, veteran status, or any other legally protected categories that apply to the Church. It is the responsibility of those involved in the hiring process to select candidates who meet or exceed the job requirements and all other qualifications outlined herein and to carefully document the selection process. Information about job openings will be posted at Employer's headquarters, on its Web site ([www.employment.lds.org](http://www.employment.lds.org)) and in other locations necessary to attract qualified candidates. Posting should be done in such a manner that a wide variety of potential applicants are exposed to the posting. An applicant is someone who has followed Employer's procedures by completing an online application for a specific, open position. For Internal Transfers, see Section 5.1 below

#### **Interviews**

If requested by the hiring department, the Human Resource Department will conduct preliminary screening interviews and refer selected applicants to the hiring department. Department management will conduct the final interviews and make the hiring decision.

#### **Applicant Reimbursement**

Prospective employees invited from outside the local area for job interviews by Employer may receive reimbursement for the cost of airfare or approved mileage when a personal car is used, car rental (when appropriate) and food and lodging expenses during the time required for the visit. Costs or reimbursements will be charged to the department concerned. When feasible, transportation should be arranged in advance through Church Travel Services.

## **Worthiness and Employment Checks**

Before an employment offer is made, the prospective employee will be asked to verify his or her temple worthiness. A human resource representative may check with the applicant's ecclesiastical leader to determine whether the applicant is worthy of a temple recommend. The applicant's previous employment history and/or credit history may also be verified. Sensitive information will be handled confidentially.

### **Extending the Job Offer**

The hiring department and the human resource representative will agree on the salary in accordance with established guidelines and will determine who will extend the job and salary offer to the selected candidate.

## **2.4 General Conditions of Employment**

### **Misrepresentations or Omission of Information**

Misrepresentations or omission of information during the application process may disqualify an applicant. If a misrepresentation or omission is discovered after an applicant is hired, he or she may be subject to immediate dismissal.

### **Verifying Authorization to Work**

Before new employees begin work, they must complete all required employment eligibility forms (e.g., the I-9 Employment Eligibility Verification form in the U.S.). The Human Resource representative reviews and verifies eligibility to ensure it is complete. All employees must be authorized to work in the country in which they will be employed. All conditions of immigration laws must be met.

The Church does not sponsor immigrants (permanent residence). Only in the case of substantial benefit to the Church and at the request of a Church department and not as an accommodation to the employee or prospective employee will the Church consider sponsoring non-immigrant visa applications. All Church sponsored applications and associated requests for services of outside legal counsel for non-immigrant work permits or visas for employees or prospective employees must have the prior written approval of 1) the applicable Director for Temporal Affairs or Managing Director of the department in which the

employee will work, 2) the Office of General Counsel, and 3) the Director, HR Legal Services.

The costs of approved petitions for and renewals of non-immigrant work permits or visas for employees, prospective employees and their family members, including travel costs associated with the processing of the work permit or visa, will be paid by the requesting department.

Corporation of the President of The Church of Jesus Christ of Latter-day Saints and Corporation of the Presiding Bishop of The Church of Jesus Christ of Latter-day Saints will hire foreign students in the United States only in positions relevant to their educational programs and in full compliance with all applicable immigration laws.

### **Hiring Individuals under 16 Years of Age**

Individuals under 16 years of age will not be hired. Employer complies with all applicable labor laws.

### **Hiring or Transferring Ecclesiastical Leaders**

Applicants or existing employees who hold the positions of Area Seventy, stake presidency member, or bishop and who would be required to relocate or otherwise disrupt their Church calling to accept employment or transfer may be considered for employment or transfer only after the situation has been reviewed with the appropriate presiding Church authority. The Office of the Quorum of the Twelve should be contacted if the individual is an Area Seventy or a stake president. If the individual is a bishop or stake presidency counselor, the situation should be reviewed with the stake president under whose jurisdiction the individual is serving. Such contact should be made only if the individual is a viable candidate for the position.

### **Reemployment after Retirement**

Employees who have activated their retirement from Employer (those who have applied for and are receiving a monthly retirement benefit) are not eligible for rehire. Employees who have retired from Church Affiliated Entity are also not eligible to be rehired by the COP or CPB. Terminated employees who are eligible for and accept mandatory lump-sum distribution of their Master Retirement Account benefits are eligible for reemployment. Employees who retire may not return to

employment as a contingent worker through an employee leasing agency.

### **Exit Interviews**

When an employee terminates employment, department management should arrange for an exit interview between the employee and a human resource representative. If a human resource representative is not available, a member of management at least one level above the employee's immediate supervisor should conduct the interview. The purpose of the exit interview is to expedite the checking-out process; to obtain the terminating employee's ID badge, parking pass, keys, computer passwords and such; and to ascertain the employee's reason for leaving Church employment.

After the exit interview, the department human resource director or manager should make a decision on rehire eligibility and insert a note on that decision in the employee's records. Employees who have been terminated for cause should be marked as ineligible for hire. Exceptions to this policy must be approved by the Director of Employee Relations.

### **Second Employment**

1. No part-time employee of a Church Operating Entity (CPB, COP, etc.) shall have concurrent employment with any other Church Operating Entity or with any Church-affiliated Entity (BYU, Deseret Book, etc.) without the prior written approval of the Managing Director, HR.

2. Full-time employees of a Church Operating Entity may have concurrent part-time employment with a Church-affiliated Entity if it is consistent with other Church policies, including the Conflict of Interest Policy. Full-time, salaried employees of a Church Operating Entity may perform work for another department or another Church Operating Entity, but without additional compensation, so long as such work is performed consistent with other Church policy, including the Conflict of Interest Policy.

3. If an individual, whose employment with a Church Operating Entity or a Church-affiliated Entity terminates during the current ACA measurement period, is thereafter hired by a Church Operating Entity into a part-time position, that employee cannot average thirty

or more hours of service per week when all the hours worked during the measurement period for Church-affiliated Entities and Church Operating Entities are combined.

4. If the employment of a full-time medically benefitted employee of a Church Operating Entity or a Church-affiliated Entity terminates, that employee cannot have part-time employment with a Church Operating Entity for at least twenty-six weeks after the termination of the prior full-time employment.

However, the restrictions described in paragraphs 3 and 4 above shall not apply if an employee described in these paragraphs is hired between four and twenty-six weeks from the referenced termination and the duration of the prior employment is shorter than the "break in service" (the time between such termination and the date such employee is hired by a Church Operating Entity).

## **2.5 Employment of Relatives and Dating**

Employees in close or family relationships may not be employed in proximate supervisory relationships or locations. They may not be employed in positions when there would be cause for management concerns about preferential treatment in hiring, promoting, allocating salary, assigning duties, arranging schedules, disciplining, or terminating. This policy also applies to General Authorities in the scope of their administrative assignments.

Single employees in proximate supervisory relationships who choose to date one another must disclose this relationship to the HR Director of their department. The Employer reserves the right to transfer one or both employees to another position, department, or location.

### **Definitions:**

1. "Close or family relationship" includes near relatives (parents, children, siblings, first cousins, nieces, nephews, uncles, aunts, grandchildren and grandparents); persons related by marriage (spouses, daughters-in-law, sons-in-law, parents-in-law, brothers-in-law, sisters-in-law); persons dating one another; and persons living in the same home.

2. The phrase "proximate supervisory relationships"

refers to reporting relationships within the same department, where one employee has the authority to make decisions about the terms and conditions of the other's employment.

3. The phrase "proximate locations" means in the same department and close geographic location where the employees would regularly be interacting with each other on work matters.

### **Family Members at the Work Site**

Except for brief visits, employees should not bring family members to the workplace. Employees should not have any of their work tasks performed by a family member.

## **2.6 Dress and Grooming Standards**

Employees are expected to dress modestly and in a conservative, professional, business-appropriate, manner that is consistent with the customs and standards of the country in which they work. Extreme clothing of any kind or style should be avoided. Shoes should be in good repair and shined. Athletic or similar shoes, regardless of color, should be avoided. Clothing should be clean, well-cared for and neatly pressed. Denim and other casual fabrics and materials should be avoided. The fit and style of clothing for both men and women should be modest. The following guidelines should be followed:

### **Women**

Professional, business-appropriate skirts or dresses of at least knee length (Skirts with immodest slits are inappropriate.)

- Casual sandals or flip-flops are not acceptable
- Pants, pantsuits and split skirts are not acceptable

### **Men**

- Ties and suits or sport coats and dress slacks
- White or light-colored dress shirts
- A suit or sport coat should be worn when leaving the department area. (On a hot day, it is appropriate to remove the coat after leaving the building.)
- Casual pants (such as Dockers®) are not acceptable

In situations where dress standards may need to be modified for modesty, safety, health, or other work-related reasons, individual departments may submit modified guidelines to the Director of Employee Relations for approval.

Extreme hairstyles are not acceptable. Hair should be clean and neatly combed. Sideburns below the earlobes and beards are not acceptable. Mustaches, if worn, should be neatly trimmed and not extend beyond the corners of the mouth. Men's hair length should be above the collar.

High standards of personal hygiene and cleanliness are expected. Cologne and perfume should be used sparingly, with sensitivity to allergies of co-workers.

### **Safety Clothing**

In accord with federal or state OSHA safety regulations, certain positions require the use of specific safety clothing or protective equipment, such as steel-toed shoes, hard hats and aprons. Departments should consult the Church's Safety, Health and Environmental Manual for guidance on situations where such equipment is necessary. The department, at its own expense, will provide the required clothing or protective equipment. If the equipment or clothing is very personal in nature and may be used away from work, such as prescription safety glasses or safety shoes, departments may establish a policy requiring employees to help with the cost of such equipment or clothing. Departments should consult with the Risk Management Division to ensure the appropriateness of the supplied clothing.

### **Uniforms**

If a division or department decides that uniforms are required for employees, the uniforms will be provided and maintained by Employer, in accord with applicable state or local law.

### **Travel**

As a security measure, employees may wear business casual attire when traveling internationally by air.

## **2.7 Technology Resources Use and Internet Communications Policy**

This policy applies to Church Workers (collectively

referred to as “users”) in use of Employer’s Technology Resources or in performance of Employer’s work. Employer’s Technology Resources are for Employer business-related purposes and are provided to certain users to assist them in performing their job duties or assignments. Each user should use Employer’s Technology Resources in a manner that increases productivity, enhances Employer’s public image and respects others.

All activities and conduct in use of Employer’s Technology Resources must maintain the highest standards associated with the sacred nature of the Church’s work and mission and be in accordance with Employer’s policies. Failure to do so may lead to disciplinary measures, up to and including immediate termination of employment, contract, or assignment.

### **Technology Resources Definition**

Technology Resources consist of all electronic devices, data, software and means of electronic communication, including but not limited to computers of all types; communication devices and equipment such as telephones, mobile phones, smart phones, voicemail and video conferencing; data and video recording and storage devices; peripheral devices such as printers, modems, fax machines and copiers; network, infrastructure and electronic communication devices; all associated operating and application software; and all associated files and data. This policy may be modified or changed at Employer’s discretion as new technology becomes available or as operational needs change.

### **Use**

Employer’s Technology Resources are to be used by users only for the purpose of conducting Employer business, with the exception of occasional and incidental personal use that does not interfere with the intended function of the equipment or decrease personal productivity, does not increase maintenance or other costs and does not involve inappropriate activity or conflict of interest. Employer assumes no liability for loss, damage, or misuse of any personal data or communications stored in or transmitted over Employer’s Technology Resources. Employer strongly discourages users from storing any personal data on Employer’s Technology Resources.

### **Improper Use**

It is a violation of Employer’s Technology Resources policy for any data composed, sent, or received via Employer’s Technology Resources to contain content that may be reasonably considered offensive or disruptive. Material that is fraudulent, harassing, sexually explicit, profane, obscene, intimidating, defamatory, or otherwise unlawful or inappropriate may not be sent by e-mail or other forms of electronic communication (e.g., social media, bulletin board systems, newsgroups, chat groups) or created on, displayed on, or stored in Employer’s Technology Resources. Users encountering or receiving this kind of material should immediately report the incident to their HR representative.

### **Obscene, Pornographic, or Sexually Related Material**

It is an absolute violation of Employer’s Technology Resources policy for any user using Employer’s Technology Resources to intentionally receive, send, compose, display, or access in any manner any material that is obscene, pornographic, or sexually related (including but not limited to images containing sexually provocative nudity). Any user who is found to have violated this provision of the Employer’s Technology Resources policy shall be immediately terminated from employment or shall have their contract or assignment immediately terminated.

### **Other Prohibited Uses**

Users may not use any of Employer’s Technology Resources for any illegal purpose, in a manner that violates any Employer policy or that is contrary to the best interests of Employer, in any way that discloses confidential or proprietary information of Employer or third parties, or for personal or pecuniary gain. Use of Employer’s Technology Resources to engage in any form of gambling or online gaming is also prohibited. Users may not attempt to access any Employer’s Technology Resources without authorization nor exceed authorized access. Users may not use deceptive methods to gain access nor attempt to compromise security controls without explicit authorization.

### **Employer Access to Technology Resources**

All messages, including personal messages, sent and



received and all data and information stored on Employer's Technology Resources are Employer's property regardless of the content. As such, Employer reserves the right to access all of its Technology Resources at any time in its sole discretion.

### **Privacy**

Users have no reasonable expectation of privacy with respect to any messages or information created or maintained on Employer's Technology Resources. Employer may, at its discretion, inspect all files or messages on its Technology Resources at any time for any reason. Employer may also monitor its Technology Resources at any time to determine compliance with its policies, for purposes of legal proceedings, to investigate misconduct, to locate information, or for any other purpose.

### **Passwords**

Certain of Employer's Technology Resources can be accessed only by entering a password. Passwords are intended to prevent unauthorized access to information. Users are expected to maintain their passwords as confidential. Users must not share passwords and must not access coworkers' systems without express authorization. Passwords do not confer any right of privacy upon any user. Thus, even though users may maintain passwords for accessing Technology Resources, users shall not have any reasonable expectation that any information maintained on Employer's Technology Resources is private.

### **Deleted Information**

Deleting or erasing information, documents, or messages maintained on Employer's Technology Resources is, in most cases, ineffective. All users should understand that any information kept on Employer's Technology Resources may be electronically recalled or re-created regardless of whether it may have been "deleted" by a user.

### **Internet Communications**

This policy provision covers all publicly accessible Internet communications, including blogs, newsgroups, discussion forums, social networks, e-mail distribution lists and other forms of news media, whether these media forms are used for personal or work purposes as

that use relates to, affects, or reflects upon Employer. Authorized representatives of Employer may access and monitor Employer-owned systems and, if needed, disclose records relating to their use.

Any information published online must be shared with caution because it becomes widely available to the public. Users have an obligation to protect confidences, respect others' privacy and otherwise act responsibly as they share information about the work they do and their job.

### **Prohibited Practices**

The following limitations are applicable to all Internet communications regarding Employer:

Never disclose confidences. The duty of confidentiality extends to current and past work assignments and all information subject to nondisclosure agreements. Consult your supervisor before publishing information when confidentiality may be an issue.

Do not identify or post pictures of vendors, customers, employees, other interested parties, office equipment, or surroundings without approval from the responsible data steward or the person to whom the information or image pertains.

- Never disclose confidences. The duty of confidentiality extends to current and past work assignments and all information subject to nondisclosure agreements. Consult your supervisor before publishing information when confidentiality may be an issue.
- Do not identify or post pictures of vendors, customers, employees, other interested parties, office equipment, or surroundings without approval from the responsible data steward or the person to whom the information or image pertains.
- Never copy or post copyrighted or trademarked materials or images without the owner's permission. This includes intellectual property of vendors, customers, Employer and The Church of Jesus Christ of Latter-day Saints.
- Do not use Employer's time or systems for fundraising; for partisan political purposes; to

endorse, support, oppose, or otherwise comment on the election or candidacy of any candidate for public office; or to advocate for the enactment or defeat of any legislation, unless it is directly and clearly within the scope of your job duties and assignment.

- Do not publish material that is obscene, profane, defamatory, libelous, threatening, hateful, harassing, or abusive to another person or entity.

### **Required Disclaimer and Comments**

You may state that you work for or serve Employer. If you do so, the following disclaimer is required: "The views expressed here are the opinions of [employee's name] and do not necessarily reflect the views of [Employer] or The Church of Jesus Christ of Latter-day Saints." Comments made on blogs can be traced back to the Church. Be cautious about commenting anonymously on blogs.

### **Updating Information While on Duty**

A supervisor may permit a user to update his or her blog or other Internet forum while at work if the information is relevant to the user's duties. Personal Internet activity should not interfere with the work duties or responsibilities of the user.

## **2.8 Work Schedules**

Employer's offices will be open as necessary to support the Church's worldwide operations. The hours of operation for each division and for each employee will be established by the department as necessary to meet these needs.

### **Standard Workweek and Workday**

The standard workweek begins Saturday at 12:01 a.m. and ends the following Friday at 12:00 midnight. The typical workweek is five eight-hour days but may vary by location as dictated by clear business need with prior approval of the department's managing director.

### **Lunch Breaks**

A minimum of a 30-minute unpaid lunch break is authorized for non-exempt employees working more than five hours in a shift or day. Non-exempt employees should not be permitted to work during their lunch break and the lunch break should not be taken at the

end of the workday. Employees may be asked to schedule lunch breaks to accommodate department needs. The timing of lunch breaks is dictated by the laws of some states. Employees and management should comply with such laws, including accurately recording start and stop times for lunch breaks in states where such recordkeeping is required.

### **Work Breaks**

Nonexempt employees are authorized a 10-minute paid break for each four hours they work. These breaks should be scheduled with the employee's supervisor to accommodate department needs. The length and timing of breaks may vary according to local or state laws. An employee should not move one or both of these breaks for the purpose of extending the lunch break, shortening the workday, or taking one 20-minute break.

### **Van or Car Pools**

Employees participating in van or car pools are expected to work a standard workday and workweek. Some variance from the department's expected arrival and departure times may be approved by the employee's department management.

## **2.9 Work-at-Home**

Work-at-home, telecommuting, or similar employment is not authorized. If employees have unusual needs that can be met only through this type of employment, the Human Resource Department must give prior written approval and the arrangement must be properly documented. This general policy does not prevent exempt employees from taking necessary work home to be completed after hours.

## **2.10 Job Descriptions**

Job descriptions are used to establish the essential functions of each job within Employer's organization and to assist in determining the value of each job. Job descriptions are necessary to assign wage and salary levels. A current, approved job description for each job must be filed with the Human Resource Department.

## **2.11 Employee Activities**

Group activities that support and enhance the overall goals of the Church are encouraged. Such activities should be approved in advance by the department head.

Departments are encouraged to hold regular (usually weekly) devotionals consisting of a song, prayer and spiritual thought. Each department head should determine the frequency of devotionals. Employees are invited, but they are not required to attend.

To facilitate social activities, departments may establish social groups. Assistance in establishing social groups will be provided by the Human Resource Department. Employees may be invited to participate in and voluntarily contribute to the social group. If desired, social groups can request that the payroll services section withhold monthly voluntary contributions from the pay of employees desiring to participate in the social group. All activities planned by social groups should be consistent with the standards of the Church. Activities should not be frequent, lengthy, or interfere with family or ward activities.

The Human Resource Department is responsible for coordinating special events that affect all employees at Church headquarters. Activities involving more than one department should be cleared with the Director, Employee Relations, of the Human Resource Department.

## 2.12 Criminal Convictions

Employer will not employ individuals with prior criminal convictions who pose an unacceptable risk to the Church or its employees, members, and visitors. Prior criminal conviction is not an absolute bar to employment and all qualified applicants will be considered for employment. Each application is reviewed and a decision is based on the specific merits of each individual case.

When applying for a job, an applicant must disclose all prior criminal convictions. The Church may also conduct a background check by an outside agency to document any prior criminal convictions. If an applicant has a prior criminal conviction, the department business partner should conduct an assessment and make a recommendation. This individualized assessment will include a number of factors including:

- The nature and gravity of the offense;
- The facts or circumstances surrounding the offense;

- The time that has passed since the offense and/or completion of the sentence;
- The nature of the job held or sought;
- The number of offenses for which the individual was convicted;
- Age at the time of conviction, or release from prison;
- The individual's employment history before and after the offense including the length and consistency of employment;
- Rehabilitation efforts, e.g., education/training; and
- Employment or character references and any other information regarding fitness for the particular position.

In no event may an employee who has been convicted of a sex offense or whose name is on a government sex offender registry be permitted to work in a position that would put them into proximity to children or youth.

The Director of Employee Relations, Human Resources Department will review and determine whether the individual may be employed.

## 3. Compensation and Benefits

### 3.1 Compensation

Employer's compensation program is designed to compensate employees fairly, while at the same time acknowledging a measure of consecration by those who earn their living in service to the Church. Compensation ranges are based on the nature of the position. Employees working in similar positions will receive comparable compensation, regardless of gender, national origin, race, ethnic status, age, or disability. Compensation may vary based on experience, performance, location and/or length of service.

#### Salary Basis Policy

Employer pays employees in accordance with the Fair Labor Standards Act (FLSA) and applicable state laws. Non-exempt employees in the United States will be paid at least minimum wage for all hours worked and will be paid at one and one half times their regular rate of pay for all hours worked over 40 hours in a workweek. (In

states where daily overtime is required, non-exempt employees shall be paid daily overtime.) Supervisors should never require, encourage, or permit non-exempt employees to work off the clock. Employees who are exempt from these requirements must qualify for an exemption under the FLSA and state law.

### **3.2 Overtime, Callback Pay, Call-in Pay and Shift Differentials**

Employees are encouraged to give a full measure of service during the time they are at work. Supervisors and managers are encouraged to review work schedules and demands so as to properly use the time employees are on the job. Overtime work and callbacks should be requested only when work cannot reasonably be accomplished within the allotted hours.

Exempt employees are expected to work the time necessary to accomplish their assigned responsibilities. Exempt employees are not eligible for overtime, callback, or shift differential.

#### **Overtime**

Nonexempt employees, as defined in the FLSA and state law regulations, who work overtime will be paid at a rate of at least one and one-half times their regular rate of pay for overtime hours worked during that workweek. Overtime is defined by the laws of the state in which the employee works. Usually, overtime is working either more than 40 hours in one week or more than 8 hours in one day. The following guidelines will assist both employees and supervisors in managing work time:

1. Any overtime work by an employee must be approved in advance by the supervisor. If an employee works unapproved overtime, the employee will be paid overtime pay but may be subject to work-related discipline.
2. The actual time that a nonexempt employee works each day is to be recorded in the time collection system. Hours should not be averaged over several days but should be recorded as actually worked each day.
3. When a supervisor anticipates that a nonexempt employee could work more than 40 hours during a workweek, the employee may be given time off

during the same workweek so that he or she works only 40 hours in the week. "Comp time" (time off during another workweek) is not to be given in lieu of overtime pay.

4. Time reported as sick leave or annual leave will not be counted as hours worked when computing overtime pay. Time reported as holiday, funeral leave, Church assignment leave (not including Church assignment leave of absence), part-time public service leave, jury duty leave, marriage leave and miscellaneous leave will be counted as hours worked when computing overtime pay.
5. If a fully benefited, nonexempt employee works on a holiday, instead of giving the employee an alternate day off (see "3.15 Holidays"), the department may elect to pay the employee the holiday pay plus the employee's regular pay. In such a case, both the actual hours worked and the holiday hours would be considered hours worked when computing overtime pay.
6. Non-exempt employees should never be asked to work "off the clock." All hours worked should be recorded in the time collection system so that the employee may receive proper compensation. Any employee who is asked to work "off the clock" should report such requests to his or her division director, to a department human resource representative, or to the Director, HR Legal Services.

#### **Callback Pay**

When a nonexempt employee is called back to work at a time other than normal or regularly scheduled working hours, the employee will be paid either for three hours or for the number of hours actually worked, whichever is greater. (Commuting time is not counted in determining hours actually worked.) Callback hours, whether the three-hour minimum or the actual hours worked, are considered as hours worked when computing overtime pay.

When a nonexempt employee is called back to work during previously scheduled annual leave, he or she has the option to reschedule the annual leave (in accord with "Leave Policy and Absentee Policy") or to be paid for both the annual leave and the callback hours. If the employee elects to be paid for both the annual leave and

the callback hours, the annual leave hours do not count as time worked for purposes of calculating overtime.

### **Call-In Pay**

Non-exempt employees who are assigned by their supervisor to be on call for a defined period of time outside their regular work hours (e.g. evenings or over a weekend) and who are required to respond to work-related phone calls, emails, or other requests for assistance (but are not required to return to the office to fulfill their duties) may be entitled to compensation. The type of pay depends on a number of factors including:

- Required response time to calls or email;
  - Employee ability to trade on-call shifts;
  - Scope of geographical travel limitations;
  - Employee ability to engage in personal activities;
- and
- Frequency of calls and emails.

**Full Compensation:** Employees who are required to respond immediately to calls and emails, who have little flexibility to trade shifts to accommodate personal and family events, who are severely limited in their ability to travel or to engage in other personal activities during the shift, and who take frequent calls or emails during the shift, are entitled to full pay during their call-in shift, including overtime pay, if applicable.

**Call-In Pay:** Employees who are permitted to respond to calls and emails within a reasonable amount of time, who have opportunity to trade shifts with other employees to accommodate personal schedules, or who are permitted to travel while being available for calls and emails, and who may engage in personal activities during the shift, and whose calls and emails are less frequent, will be entitled to "Call-in Pay" of \$100 for a full week or \$50 for a partial week or weekend. Call-in pay is in addition to pay for actual time worked while on Call-in status.

### **Shift Differential**

Nonexempt employees who work evening or night shifts may be eligible for shift differential pay. Department heads, in consultation with the director of

compensation and benefits in the Human Resource Department, will determine the positions, classifications and schedules that are eligible. Payment of shift differential is calculated on a daily basis. Assuming the following criteria are met, eligible employees will be paid the shift differential for all hours worked. Shift differential will not be applied to absence pay, such as holiday, annual leave and sick leave.

1. At least half of the employee's regularly scheduled work hours for the entire workday must be between 3:00 p.m. and 11:00 p.m. for the evening shift or between 11:00 p.m. and 7:00 a.m. for the night shift.
2. The employee actually works at least half of his or her hours between the applicable hours for the evening or night shifts.
3. If during a workday an employee is regularly scheduled to work and actually works half of the time on one shift and half on another shift, all hours worked will be paid at the higher shift differential rate.

## **3.3 Workers Compensation**

An employee who is injured on the job or who suffers a work-related illness may be eligible for benefits under Employer's workers' compensation plan. State statutes and regulations determine the benefits for which an employee may be eligible. Benefits are paid by or through either the appropriate state agency or Employer's workers' compensation insurance claims administrator. Employer provides workers' compensation benefits that meet or exceed state employment laws and/or regulations.

An employee must immediately report any on-the-job injury or work-related illness, no matter how minor, to his or her supervisor. Failure to do so within the time required by law may result in loss or reduction of benefits and work-related disciplinary action. Supervisors have the responsibility to ensure that claims are promptly reported to the insurance carrier. Department management investigates unsafe work practices and takes appropriate corrective action.

After an on-the-job injury or as a result of a work-related illness, if an employee is unable to perform all of his or her job-related duties, the employee may be

eligible for Temporary Total Disability (TTD) or Temporary Partial Disability (TPD) benefits. The exact nature of and qualifications for these benefits will depend on the law of the state where the employee works.

Most states require a waiting period between the injury and the commencement of TTD or TPD benefits. In some states, if the employee is unable to work for a period of time longer than the required waiting period, benefits will be paid retroactively to cover the waiting period. (For example, in Utah an employee must be unable to work for more than three days before he or she is eligible for TTD or TPD benefits. If the employee is unable to work for more than 14 days, he or she can receive retroactive compensation for the three-day waiting period.) If the employee returns to regular or transitional employment before the retroactive benefit requirements are met, accrued sick or annual leave may be used to cover the waiting period.

An employee receives TTD benefits when he or she is unable to perform the duties of his or her job. TTD produces the following modifications of benefits usually provided by Employer:

1. Recipients of TTD do not accrue annual or sick leave.
2. Holiday pay is not received because TTD benefits are paid instead.
3. The employee must make arrangements to pay his or her portion of any Deseret Mutual Benefit Administrators premiums that come due, unless the employee has also applied for and been approved for long-term disability, in which case the premiums are paid as provided in Deseret Mutual Benefit Administrators' guidelines.
4. Sick or annual leave may not be used to supplement either retroactive lost-wage benefits or TTD benefit payments unless 1) the employee has applied for and been approved for long-term disability benefits, or 2) State maximum TTD benefit is less than two thirds of gross income (supplement not to exceed two thirds gross income).

The time fully benefited employees are away from work on approved workers' compensation leave will be counted as years of service for retirement and annual

leave accrual purposes. Fully benefited employees who are unable to return to regular work duties or begin transitional work within 45 days of their injury should apply for long-term disability.

Temporary Partial Disability (TPD) benefits are paid when an employee can perform some duties but cannot work a full day. When an employee can work a full day but cannot perform all of the duties of the position he or she occupied prior to the injury or illness, the employee may be approved for transitional duty. (See below for information on transitional duty.) When an employee is receiving TPD, the following modifications occur to the benefits he or she would usually receive:

1. Recipients of TPD accrue prorated annual or sick leave based on the number of hours they are able to work per pay period.
2. Prorated holiday pay is received based on the average daily hours worked during the pay period of the holiday. TPD benefits are paid for the hours not worked.
3. The employee must make arrangements to pay his or her portion of any Deseret Mutual Benefit Administrators premiums that come due, unless the employee's pay for hours worked is in excess of the insurance premiums.
4. Sick or annual leave may not be used to supplement retroactive lost-wage benefits or TPD benefit payments.

It is in the interest of Employer and employees that injured workers return to work – either their regular duties or some form of transitional work – as soon as they can safely do so. In working with employees to help them return to work, management should focus on abilities rather than disabilities. These return-to-work activities are coordinated by the Risk Management Division with department personnel and the insurance adjustor. Before an employee is allowed to return to work, the employee must give management notice that he or she is ready to return to work and must provide a fitness for duty certificate from his or her health care provider. The release should list limitations, if any, and should show the date when the employee is cleared to begin working. Workers' compensation lost-time payments stop when the employee returns to work full-

time (either at his or her original job or at transitional duty) or when Employer offers return-to-work activities, even if the employee elects not to return to work. Further details are available through the workers' compensation section of the Risk Management Division.

### **3.4 Transitional Work**

Transitional work reduces the impact of work-related injuries on employees and on Employer by allowing injured workers to receive their regular pay for work activities that are within the restrictions of their medical condition. Transitional assignments may occur within the workgroup or across traditional workgroup boundaries, depending on the doctor's restrictions and available work opportunities.

Transitional work is temporary in nature. Employees may participate in transitional work for up to 90 calendar days, depending on their medical condition and the treating doctor's recommendations. At the conclusion of the transitional work period, employees must return to their regular job duties, request an extension of transitional work, request accommodation of restrictions, or terminate employment.

1. When the employee is released by the doctor to return to full duty without restrictions and is still qualified to perform the duties of the former position, the employee should be reinstated to a position as comparable as possible to his or her former position in terms of pay, job level and benefits.
2. In exceptional circumstances, employees may make a written request for extended transitional work. This request should include a written medical assessment by the treating doctor, an itemized list of current restrictions, a prognosis for recovery and a projected date of maximum medical improvement. It is the injured workers' responsibility to provide the information necessary to consider the request prior to the conclusion of the transitional work period. Requests for extended transitional work will be reviewed by the employee's supervisor, human resource representative, other appropriate management persons and the Risk Management Division.
3. Employees may request reasonable accommodations, if appropriate; to allow them to perform the essential

functions of the job they held when they were injured. The employee should notify the department's human resource representative, who, together with management and the ADA Committee, will consider whether reasonable accommodations can be made. Reasonable accommodations may include transfer to an open job that the employee is qualified to perform. If reasonable accommodations can be made, the employee may return to work. In such cases, the supervisor should notify the workers' compensation section of the Risk Management Division.

4. If an employee is unable to return to regular job duties within 90 days, with or without a reasonable accommodation, if extended transitional work has not been approved, or if transfer to another job is not possible, the employee may choose to resign (or retire, if eligible), or Employer may consider termination of employment where appropriate. If eligible, injured workers continue to receive workers' compensation benefits in accordance with state workers' compensation laws or regulations.

### **3.5 Employee Benefits**

Employer's general policy is to provide employees with a benefit package comparable to the average benefit package offered by comparable employers. From time to time the Compensation and Benefits Division of the Human Resource Department will obtain information on benefit packages from selected companies. Employer's benefit package may then be increased or decreased. The specific benefits available to employees depend on the nature of the employee's position.

#### **Benefits Available to All Employees**

All employees are eligible to participate in the following benefits:

1. Parking permit, where available
2. Deseret Book Store periodic discount
3. Health Unit Services (the Employee Health Unit provides basic health services and training for employees at the headquarters facility)
4. Access to the employee cafeteria, if one is on the work site

## **Additional Benefits Available to Designated Employees**

Designated employees (generally those who work full time and occupy an FTE position and who hereafter are referred to as "fully benefited") are eligible to participate in additional benefit programs. These include:

1. Health, dental, disability, group term life, supplemental group term life and accidental death and dismemberment insurance programs.
2. The Thrift Plan. Employees who are at least 21 years of age may be eligible to participate in the Thrift Plan. Specific information about eligibility and participation is contained in the Deseret Mutual Benefits Administrators' Benefits Handbook, available from the Compensation and Benefits Division of the Human Resource Department. Some part-time employees are eligible to participate in the Thrift Plan.
3. The Master Retirement Plan. Specific information about eligibility for retirement benefits and other retirement matters is contained in the Deseret Mutual Benefit Administrators' Benefits Handbook. Some part-time employees are eligible to participate in the Master Retirement Plan.
4. Paid holidays.
5. Paid time off for annual, sick and other types of leave.
6. Membership fees for professional associations. Employer will participate in the cost of dues or membership fees for professional associations when doing so benefits Employer and the employee. Employer will not pay fees for social or civic organizations. Decisions regarding the value of membership in professional associations are made by the department head. The following guidelines apply:
  - a. If Employer requests that the employee participate in a professional organization, if participation is a legal requirement for the employee to perform his or her work, or if the organization or association relates to the primary function of the employee's work assignment and benefits Employer, Employer will pay 100 percent of the cost.
  - b. If the organization or association relates to a

secondary function of the employee's work assignment and is of more value to the employee in maintaining a professional status than providing an avenue of information and services to Employer, Employer will pay up to 50 percent of the cost.

7. A special death benefit. If an active, fully benefited employee (not on disability or on extended leave without pay) dies, in addition to payment of vested, unused annual leave, a special death benefit will be paid according to the following schedule:
  - a. If the employee has worked less than one year, no benefit is paid.
  - b. If the employee has worked at least one year but less than two years, a benefit equivalent to one week's salary will be paid.
  - c. If the employee has worked two or more years, a benefit equivalent to two weeks' salary will be paid.
8. If an employee who has terminated employment returns to fully benefited employment within 12 months of his or her termination date, benefits based on length of service will be restored as if there had not been a break in service. For example, sick leave balances will be restored to the pre-termination amount, annual leave accrual rate will be restored and entitlement to other length-of-service benefits will be determined based on the total length of actual service. If more than 12 months pass between termination and rehire, all non-vested benefits begin as if the employee was a new hire.

### **Benefits at Termination**

Generally, insured benefits continue to the last day of the month in which employment ends. Noninsured benefits end on the last day worked. For information on specific benefits, consult the Deseret Mutual Benefits Administrators' Benefits Handbook. Unused vested annual leave will be paid out at termination.

## **4. Leave**

### **4.1 Leave Policy and Absentee Policy**

Regular attendance is an essential function of each of



Employer's jobs. In most circumstances, if an employee is absent, co-workers must fill in for the missing employee. Employees who are absent, tardy, or leave before completing their regularly scheduled workday are responsible for notifying their supervisors as soon as possible. Normally, notice must be given within two hours of the employee's usual starting time or the employee's early departure from work. Employees who are absent from work and fail to notify their supervisors will be subject to corrective action. Employees who have been absent three consecutive days without notifying their supervisor will be considered to have voluntarily resigned.

All leave and absence events must be accurately and timely recorded in a manner prescribed by Employer. Failure to do so may result in disciplinary action.

### **Leave Accrual**

Annual leave and sick leave hours are accrued each pay period as the employee works throughout the year. Individual increments of annual or sick leave cannot be used in the pay period in which they are accrued. Annual and sick leave hours accrue while the employee is using paid leave, but they do not accrue while the employee is on leave without pay. Employees on an approved leave of absence will have their unused sick leave balance and annual leave earning rate restored when they return to work. Time spent on an approved leave of absence will be counted in determining annual leave accrual rate.

If an employee who has terminated employment returns to fully benefited employment within 12 months of his or her termination date, the employee's unused sick leave hours and annual leave accrual rate will be restored to the levels existing prior to termination. If more than 12 months pass between termination and rehire, the sick leave balance and annual leave accrual rate will be determined as if the employee was a new hire.

### **Use with Long-Term Disability**

Employees who are placed on long-term disability leave (LTD) may use annual or sick leave to supplement their disability leave payments. The amount of leave pay, when added to the LTD benefits and any other offsets considered by Deseret Mutual Benefits

Administrators, may not exceed 100 percent of the employee's normal pay. In such cases, employees accrue a prorated amount of annual and sick leave.

### **Use with Workers' Compensation Benefits**

Employees who are receiving workers' compensation Temporary Total Disability (TTD) benefits may not use annual or sick leave to supplement such payments. In addition, they do not accrue leave while on TTD. Employees receiving Temporary Partial Disability benefits accrue leave at prorated amounts. Employees who are participating in transitional work accrue leave at their usual rates unless they are working less than full time, in which case leave hours are accrued on a prorated basis.

### **Use in Calculating Overtime Pay**

Annual and sick leave hours do not count as hours worked for purposes of calculating overtime pay.

### **Annual Leave**

Annual leave is provided to allow employees time away from work for rest, renewal and time with their families. Employees are encouraged to take annual leave, including at least one increment of five consecutive working days each year.

Accrued annual leave must be scheduled with the employee's supervisor in advance. In granting approval for leave, supervisors should consider the needs of the business as well as the employee's desires. In scheduling several employees' leave periods that conflict or overlap, supervisors should first consider Employer's needs and then attempt to reach an arrangement that is acceptable to the employees involved. In the event such an agreement is not possible, preference should be given on the basis of length of service.

Employees accrue annual leave according to the following schedule:

\*Approximate, based on a payroll year of 26 pay periods

There is a cap on annual leave accrual. Employees may accrue up to 200% of their annual leave. If the employee's annual leave reaches the maximum, further accrual of annual leave time is suspended until the

employee has reduced the annual leave balance below this limit. Thus, by way of example, a non-exempt employee who has worked for the Employer for five years will cease accruing additional paid annual leave once the employee has accumulated 240 (i.e., 120 hours x 200%) hours or 30 days. If the employee later uses enough annual leave to fall below the maximum, the employee will resume earning paid annual leave from that date forward. In such a case, no annual leave will be earned for the period in which the employee's annual leave was at the maximum.

All annual leave is paid out only when an employee terminates (whether voluntarily or involuntarily), retires, dies, is transferred to a Church-affiliated entity (e.g. Deseret Book, DMBA, etc.) or, if requested, is placed on long-term disability leave or on Church ecclesiastical leave. Employees going on military leave may choose to save annual leave or may request a payout of such leave (see "Military Leave"). Annual leave is paid at the employee's final rate of pay at the time of the employee's separation.

If a paid holiday falls within an employee's annual leave period, the holiday will not be considered annual leave.

When a nonexempt employee is called back to work during previously scheduled annual leave, the employee has the option to reschedule his or her annual leave in accord with this policy or to be paid for both the annual leave and the callback hours (see "Overtime, Callback Pay, Call-In Pay and Shift Differentials").

### **Sick Leave**

Sick leave is provided by Employer to assist employees in case of illness or accident suffered by the employee or an immediate family member living in the employee's home. Sick leave also may be used in case of illness or accident suffered by the employee's parent. Sick leave is not an entitlement to be used without actual need. Rather, it is part of Employer's short-term disability policy and should be viewed as income protection insurance. Employees are encouraged to use their sick leave wisely and to accumulate sufficient sick leave to provide income protection during the 45-calendar-day waiting period necessary in the event the employee needs to apply for long-term disability. There is no limit to the amount of sick leave an employee may

accrue.

Whenever an employee needs to use sick leave, the provisions of the federal Family Medical Leave Act and its state counterparts may be applicable. These laws provide certain job protection benefits to employees. (See "Family and Medical Leave" section later in this policy for more information.)

Sick leave may be used appropriately in the following circumstances:

1. When an employee is unable to work because of personal illness or injury.
2. When an employee misses work due to pregnancy of the employee or the employee's spouse. (For details on the scope of this leave see "Pregnancy-Related Leave" policy, below.)
3. To cover time away from work for medical, dental and optical examinations, with advance scheduling with supervisors. (When possible, employees should schedule such examinations outside of working hours.)
4. To offset the waiting period under workers' compensation laws between an on-the-job injury and payment of lost-time benefits, but only if the employee returns to regular or transitional work before becoming eligible for lost-time benefits under the workers' compensation laws.
5. To cover time lost from work while caring for other immediate family members (spouse and children) who live in the employee's home. Also to cover time lost from work while caring for sick or injured parents.
6. To make up the difference between LTD benefits and the employee's usual take-home pay (see the "Use with Long-Term Disability" section of "Leave Policy and Absentee Policy").

A fully benefited employee working 40 hours per week accrues 3.08 hours of sick leave for each pay period, up to a maximum of 80 hours per year. A fully benefited employee working less than 40 hours per week accrues a prorated portion of 3.08 hours of sick leave for each pay period worked. No payout of unused sick leave is given to terminating or retiring employees

nor will sick leave balances be transferred to other employers including Church-affiliate entities. Sick leave balances will transfer among Church Operating Entities.

When an illness exceeds three consecutive workdays, employees may be asked to furnish a medical statement from their health care provider detailing the duration of the illness. Following an absence due to illness or accident, an employee may be asked to provide a doctor's release to return to work, certifying that the employee is able to perform the essential functions of the job. Management also may seek a doctor's release if the employee states that he or she can return to work but with limitations. In order to protect the employee's privacy, medical information is kept in a separate medical file and not in the employee's personnel file.

If an employee becomes ill while on annual leave, the employee may, upon medical verification if requested, substitute sick leave for annual leave.

An employee who does not have sufficient accrued sick leave to cover the entire time of a medically related absence will first use sick leave and then annual leave until it is exhausted. If additional time is needed, the employee will be on leave without pay.

### **Pregnancy-Related Leave**

Employees with a pregnancy-related medical condition, or whose spouse has a pregnancy-related medical condition, may take pregnancy-related leave if they are otherwise eligible for such leave under the Family and Medical Leave Act ("FMLA") or applicable state laws. Federal and state laws generally run concurrently and employees are entitled to whichever law provides the employee with greater protection. Likewise, employees who have given birth, whose spouse has given birth, or who have adopted a child may take baby bonding leave if they are otherwise eligible for such leave under the Family and Medical Leave Act or applicable state laws. Managers who receive pregnancy-related leave requests should contact their HR representative to respond to such requests.

If an employee is FMLA eligible, the employee may take up to 12 weeks of FMLA leave per year, including for the employee's own pregnancy-related condition, to care for a spouse with a pregnancy-related medical condition, or for baby bonding. Employees must follow

all requirements for applying for FMLA leave, as set forth in the "Family and Medical Leave Act" policy, below. Employees are entitled to applicable state law leave protections if they are eligible for such protections under applicable state law. If an employee is not eligible for pregnancy-related leave under FMLA or applicable state law, the employee may request up to 6 weeks of unpaid leave for pregnancy-related leave or for baby bonding. All requests that are not protected by FMLA or state law will be considered in light of current staffing needs.

Time off needed for prenatal care doctor visits, severe morning sickness, doctor-ordered bed rest, childbirth, recovery from childbirth or miscarriage and baby bonding would all be covered by a pregnancy-related leave. With the exception of baby bonding, pregnancy-related leave does not need to be taken in one continuous period of time, but may be taken on an as-needed basis. Employees taking time off or leave for pregnancy-related reasons are required to use accrued sick leave first. Once sick leave is exhausted, employees must apply accrued annual leave for the remainder of the leave. If an employee exhausts sick and annual leave but must still remain out on leave that is protected by FMLA or state law, the employee shall take this time as leave without pay.

Generally, Employer will treat an employee's pregnancy-related condition the same as it treats other medical conditions of similarly situated employees.

If an employee is affected by pregnancy or a related medical condition, she may also request a transfer to a less strenuous or hazardous position or to less strenuous or hazardous duties, if this transfer is required by a health care provider certification. The certification should include (1) the date of the medical advisability for the transfer; (2) the probable duration of the period(s) for the advisability of the transfer; (3) a statement that, due to the pregnancy, the employee is unable to perform one or more of the essential functions of her position without undue risk to herself and/or the successful completion of the pregnancy; and (4) a statement that due to her pregnancy, the employee's transfer is medically advisable. All such requests for transfer will be considered in light of current staffing needs.

Employees should provide at least 30 days advance notice of the need for a leave or transfer. If 30 days advance notice is not practicable, notice should be given as soon as possible.

### **Nursing Mothers Accommodation**

An employee may take reasonable breaks to express breast milk for her infant child each time the employee has need to express milk. Employer will designate a private and clean space (not a bathroom) to accommodate expressing and storing of breast milk. In work locations where Employer has not already designated a specific place for the employee to express and temporarily store breast milk, the employee and her manager shall work together to identify an appropriate location.

For non-exempt employees, any break time or breaks taken in excess of normally provided paid breaks will be unpaid breaks. For example, if an employee who normally receives two paid 10-minute breaks and one unpaid 30-minute lunch break during her work day takes 30 minutes during each of her breaks plus her full 30-minute lunch break to express milk, the time in excess of the normal 10-minute paid breaks will be unpaid, as will the lunch break. Non-exempt employees may not extend their scheduled work days to accommodate such breaks.

### **Leave Share**

Employer has established a leave-sharing program whereby employees may donate a portion of their vested annual leave to a fund to assist other employees whose sick and annual leave balances are exhausted due to unanticipated injury or illness. This fund is administered by the Human Resource Department.

### **Disability Benefits and Leave**

To receive long-term disability benefits, an employee must meet eligibility requirements established by Deseret Mutual Benefit Administrators. In most cases, these requirements include being absent from work for 45 consecutive calendar days. Employees may use their accumulated sick leave and then their annual leave to cover this time away from work. If employees do not have sufficient accumulated leave to cover the entire period, they will be placed on Leave of Absence without

Pay (Illness or Accident).

### **Family and Medical Leave**

The federal Family and Medical Leave Act (FMLA), along with counterpart laws enacted by some states, allow eligible employees to have time away from work to take care of certain personal and family medical situations.

1. Basic Leave Entitlement. FMLA requires covered employers to provide up to 12 weeks of unpaid, job-protected leave to eligible employees for the following reasons:

- a. For incapacity due to pregnancy, prenatal medical care, or childbirth.
- b. To care for the employee's child after birth or placement for adoption or foster care.
- c. To care for the employee's spouse, son or daughter, or parent who has a serious health condition.
- d. For a serious health condition that makes the employee unable to perform the employee's job.

2. Military Family Leave Entitlements. Eligible employees whose spouse, son or daughter, or parent is on covered active duty or call to covered active duty status may use their 12-week leave entitlement to address certain qualifying exigencies. Qualifying exigencies may include attending certain military events, arranging for alternative childcare, addressing certain financial and legal arrangements, attending certain counseling sessions and attending post-deployment reintegration briefings.

FMLA also includes a special leave entitlement that permits eligible employees to take up to 26 weeks of leave to care for a covered service member during a single 12-month period. A covered service member is (1) a current member of the Armed Forces, including a member of the National Guard or Reserves, is undergoing medical treatment, recuperation, or therapy is otherwise in outpatient status; or is otherwise on the temporary disability retired list for a serious injury or illness\*; or (2) a veteran who was discharged or released under conditions other than dishonorable at any time during the five-year period prior to the first date the eligible employee takes FMLA leave to care for the

covered veteran, and who is undergoing medical treatment, recuperation, or therapy for a serious injury or illness\*.

\*The FMLA definitions of “serious injury or illness” for current servicemembers and veterans are distinct from the FMLA definition of “serious health condition”.

**3. Benefits and Protections.** During FMLA leave, the employer must maintain the employee’s health coverage under any “group health plan” on the same terms as if the employee had continued to work. Upon return from FMLA leave, most employees must be restored to their original or equivalent positions with equivalent pay, benefits and other employment terms.

Use of FMLA leave cannot result in the loss of any employment benefit that accrued prior to the start of an employee’s leave.

**4. Eligibility Requirements.** Employees are eligible if they have worked for a covered employer for at least 12 months, have 1,250 hours of service in the previous 12 months\* and if at least 50 employees are employed by the employer within 75 miles.

\*Special hours of service eligibility requirements apply to airline flight crew employees.

**5. Definition of Serious Health Condition.** A serious health condition is an illness, injury, impairment, or physical or mental condition that involves either an overnight stay in a medical care facility, or continuing treatment by a health care provider for a condition that either prevents the employee from performing the functions of the employee’s job or prevents the qualified family member from participating in school or other daily activities.

Subject to certain conditions, the continuing treatment requirement may be met by a period of incapacity of more than 3 consecutive calendar days combined with at least two visits to a health care provider or one visit and a regimen of continuing treatment, or incapacity due to pregnancy, or incapacity due to a chronic condition. Other conditions may meet the definition of continuing treatment.

**6. Use of FMLA Leave.** An employee does not need to use this leave entitlement in one block. Leave can be taken intermittently or on a reduced leave schedule

when medically necessary. Employees must make reasonable efforts to schedule leave for planned medical treatment so as not to unduly disrupt the employer’s operations. Leave due to qualifying exigencies may also be taken on an intermittent basis.

**7. Substitution of Paid Leave for Unpaid Leave.** Employees may choose or employers may require use of accrued paid leave while taking FMLA leave. In order to use paid leave for FMLA leave, employees must comply with the employer’s normal paid leave policies.

**8. Employee Responsibilities.** Employees must provide 30 days advance notice of the need to take FMLA leave when the need is foreseeable. When 30 days’ notice is not possible, the employee must provide notice as soon as practicable and generally must comply with an employer’s normal call-in procedures.

Employees must provide sufficient information for the employer to determine if the leave may qualify for FMLA protection and the anticipated timing and duration of the leave. Sufficient information may include that the employee is unable to perform job functions, the family member is unable to perform daily activities, the need for hospitalization or continuing treatment by a health care provider, or circumstances supporting the need for military family leave. Employees also must inform the employer if the requested leave is for a reason for which FMLA leave was previously taken or certified. Employees also may be required to provide a certification and periodic recertification supporting the need for leave.

**9. Employer Responsibilities.** Covered employers must inform employees requesting leave whether they are eligible under FMLA. If they are, the notice must specify any additional information required as well as the employees’ rights and responsibilities. If they are not eligible, the employer must provide a reason for the ineligibility.

Covered employers must inform employees if leave will be designated as FMLA-protected and the amount of leave counted against the employee’s leave entitlement. If the employer determines that the leave is not FMLA-protected, the employer must notify the employee.

**10. Unlawful Acts by Employers.** FMLA makes it

unlawful for any employer to:

- Interfere with, restrain, or deny the exercise of any right provided under FMLA; and
- Discharge or discriminate against any person for opposing any practice made unlawful by FMLA or for involvement in any proceeding under or relating to FMLA.

11. Enforcement. An employee may file a complaint with the U.S. Department of Labor or may bring a private lawsuit against an employer.

FMLA does not affect any federal or state law prohibiting discrimination or supersede any State or local law or collective bargaining agreement which provides greater family or medical leave rights.

While on FMLA leave, employees are required to use available sick leave, if applicable and annual leave before using leave without pay. Sick leave must be used in compliance with Employer's sick leave policy. Insured benefits, such as medical insurance, continue while an employee is on FMLA leave. For any period of time when the employee will be on unpaid leave, the employee is responsible to make arrangements to pay his or her share of the insurance premiums. Employees using FMLA leave may contribute to the Thrift Plan during the time they are on paid leave.

In order to administer FMLA leave fairly and consistently, the following guidelines should be used:

1. For delivery and recovery from childbirth, a female employee may use, without documentation, up to six weeks of her accrued sick leave for a normal delivery and up to eight weeks for a delivery with complications. Upon certification by a health care provider, additional sick leave hours may be used. Any further time (bonding time), up to the maximum available FMLA leave, is first taken as annual leave and then as leave without pay.
2. For assisting his wife in delivery and recovery from childbirth or to assist in caring for a new child with health problems, a male employee may use their accrued sick leave without medical certification for up to six weeks for a normal delivery and up to eight weeks for a delivery with complications. Additional accrued sick leave hours may be used if a health care

provider certifies that the employee's wife or newborn child is in need of further medical care.

3. For adoption or bonding with a well-child, time is taken as annual leave until it is exhausted. For adoption or bonding of a sick child, time is taken as outlined by the FMLA for a sick child. Additional bonding time, up to the maximum available FMLA leave, is taken as leave without pay. Intermittent leave is not available for adoption or bonding with a well-child.
4. When caring for a child or spouse with a serious health condition who lives in the employee's home, or when caring for a parent with a serious health condition, time is taken as sick leave until it is exhausted and then as annual leave until it is exhausted. Additional leave, up to the maximum available FMLA leave, is taken as leave without pay. When the child or spouse is not living in the employee's home, the time is first taken as annual leave and then as leave without pay.
5. Where both husband and wife are employees of Employer and both are eligible for FMLA leave, they are limited to a combined total of 12 weeks of leave during the 12-month period if taken for (a) the birth of the employees' child or related care following birth; (b) receiving an adopted or foster child or caring for the child after he or she is placed with them; or (c) the care of the employees' parents. Any sick leave taken by the wife to recover from the birth of the child is not counted as part of this joint time. Likewise, any sick leave taken by the husband to care for his wife following the birth of their child is not part of this joint time.
6. When a husband and wife both use a portion of the 12 weeks of available leave for one of the purposes stated in paragraph 5 above, the remaining available leave for each spouse is the difference between 12 weeks and the portion of the leave taken under paragraph 5 that is allocated to the spouse.
7. If an employee needs intermittent leave, he or she and the supervisor should work together to schedule the leave so that it serves the employee's need while causing minimal disruption to the workplace. Management may transfer the employee to another position in order to accommodate the employee's

need to take intermittent leave.

8. While on FMLA-Military Leave for a “qualifying exigency,” the time is first taken as annual leave and then as leave without pay.

If the need for the leave is foreseeable, an employee must provide at least 30 days' advance notice before the requested FMLA leave is to begin. If 30 days' notice is not possible, notice must be given as soon as practical. Failure to give proper notice may result in delay of the requested leave or even cause the employee to be ineligible for FMLA leave.

Upon returning from FMLA leave, an employee will be restored to the same position held prior to commencement of the leave unless it was necessary to fill the employee's position. In such case, the employee will be returned to an equivalent position in terms of pay, benefits and conditions of employment.

Employer uses the rolling 12-month look back method in determining available FMLA leave. Each time an employee takes FMLA leave, the remaining leave entitlement is the balance of the 12 weeks which has not been used during the immediately preceding 12 months. FMLA leave is available only for the reasons specified above. An employee may not work for any other employer while on FMLA leave.

Employees who need to use FMLA leave should consult their human resource representative.

### **Leaves of Absence**

Leaves of absence without pay (LWOP) may be approved by the department's managing director or his designee and the human resource director or manager to help employees in various personal circumstances. LWOP may be approved only after the employee has exhausted sick and/or annual leave, in accord with applicable policies. LWOP may be approved in the following situations:

1. *Illness or accident:* When an employee has an illness that lasts longer than the combined total of accumulated sick and annual leave, he or she may be placed on LWOP. The provisions of state and federal family medical leave statutes may be applicable to and will govern such leave requests. If the absence due to illness or accident is expected to last more than

45 days, the employee should make application for long-term disability.

- a. LWOP may last as long as the employee is unable to work because of illness or accident, as verified by a health care professional. If an employee desires to begin leave more than two weeks before scheduled hospitalization, surgery, or estimated delivery of a baby, the request must be accompanied by a doctor's statement regarding the need for early leave. If the leave is to continue more than four weeks after the hospitalization, surgery, other illness, or delivery of a baby (six weeks for baby delivery with complications), the employee must provide a doctor's statement regarding the need for the extended leave. As allowed by applicable statutes, Employer may request recertification by a health care professional of the need for leave.

- b. Within three days of clearance to return to work, employees are expected to advise their supervisor of a return-to-work date. If an employee can return to work without medical restrictions, he or she will be reemployed as soon as possible. To the extent possible, the employee should be returned to the same position or to a position that is comparable in pay, job level and benefits. If the authorization to return to work contains permanent medical restrictions, management will work with the employee to determine whether reasonable accommodations can be made to allow the employee to perform the essential functions of his or her job. Accommodations may include assignment to another job.

- c. At no time should employees be asked or expected to work in excess of reasonable medical advice.

2. *Employee reasons:* An employee may request LWOP for personal reasons unrelated to illness or accident. If such a leave is covered by family medical leave statutes, the provisions of those statutes will be applicable to the request. A request for leave for reasons other than those covered by family medical leave statutes may be approved if the employee is an outstanding performer and it is in Employer's interest to reinstate the employee at the end of the leave.

- a. These leaves must be approved by the department managing director and should not extend beyond one year. At the end of the approved leave, the employee

should return to work or be terminated.

b. An employee may continue participation in the insurance benefits in accord with relevant guidelines issued by Deseret Mutual Benefits Administrators.

3. *Employer reasons:* Under certain circumstances, such as a temporary temple closure, Employer may place essential employees on leave. Employees may choose to use accrued annual leave before being placed on LWOP. During this leave, Employer will continue to pay its share of insurance premiums. Employees must make arrangements to pay their share of insurance premiums so coverage will continue uninterrupted.

The following conditions are applicable to LWOP status:

1. While on LWOP, employees do not accrue sick or annual leave. The time spent on approved LWOP will be counted in determining the rate at which employees accrue annual leave.
2. When an employee returns to active status, unused sick leave will be restored to the employee.
3. Time spent on approved LWOP will count in determining years of service for employees eligible to participate in the Master Retirement Plan.
4. Unless otherwise required under family medical leave statutes or under workers' compensation statutes, employees who desire to continue insurance coverage must make arrangements to pay the insurance premiums. Employer will pay its share of the premium only for the duration of approved leave under family medical leave statutes or while an employee's application for disability benefits is pending (including initial application and any appeal). If long-term disability benefits are approved for an employee, insurance premiums are paid in accord with the provisions of the LTD plan. If long-term disability benefits are not approved, Employer will not pay insurance premiums after expiration of applicable leave periods under state or federal family medical leave laws.
5. If a paid holiday occurs while an employee is on LWOP status, the employee will not be paid for the holiday. (See also "Military Leave.")

The following conditions apply to returning to work from LWOP status:

1. When an employee is ready to return to work following LWOP (including LTD) that extended beyond family medical leave or did not qualify for such leave, the employee will be returned to a position as comparable as reasonably possible in pay, job level and benefits. If such a position is not available in the employee's former department, the Human Resource Department will assist in placing the employee in a suitable position elsewhere in Employer's organization. If no position is immediately available, the former department normally is responsible to employ the individual until an appropriate position becomes available. The Human Resource Department will help coordinate necessary budget details.
2. If the LWOP has been because of illness or accident, before the employee returns to work he or she should provide a medical release or certification from a health care provider indicating that the employee is able to return to work and setting forth any restrictions or limitations.

## **Other Leaves**

### **1. Church Assignment Leave of Absence (with and without pay)**

a. *Area Seventies:* Fully benefited employees serving as Area Seventies are permitted time off with pay to perform responsibilities assigned and scheduled by the Office of the Council of the Twelve or the employee's area leadership. Additional time, beyond that needed for scheduled assignments, such as for side trips or other personal reasons, should be scheduled in advance with the employee's supervisor and taken as annual leave or leave without pay.

b. *Mission and Temple Presidents:* Fully benefited employees called to serve full-time as a mission or temple president, or whose spouses are called to serve full-time as a mission or temple president, will be placed on Church Assignment Leave of Absence without pay (or equivalent country leave without pay) for the duration of their service ("Service"). During the month prior to the commencement of Service and the month following completion, the employees will receive full



pay and benefits, but will not be required to perform work duties except as may reasonably be required for transition purposes. Benefits during the term of Service will be as follows:

1. Sick and Annual Leave. Sick or annual leave is not accrued during Service. Unused sick and annual leave hours accrued before Service will be reinstated upon return from Service. Time spent during Service will be included in the rate of accrual for annual leave if annual leave accrual rate is determined by years of Service.

2. Retirement (Pension) Benefits. Primary employer-funded pension benefits, as determined by the respective area benefits committee (ABC), will be preserved, when possible. For example, if the primary pension benefit in a country is a private plan, employer will continue to contribute its portion. If the primary plan is a social plan, when possible, employer will maintain contribution benefit value. In the United States, time spent during Service will be included in years of service for the Master Retirement Plan.

3. Medical Insurance Benefits. Employees will be provided with a medical reimbursement plan for the duration of Service by the respective Missionary or Temple Department for which they are performing Service. It is intended that employees return to their pre-Service medical plans upon return from Service. If returning to the pre-Service plan is put at risk by absence during Service or preexisting conditions, employees' participation in the plan will be maintained for the duration of Service and funded by the employer.

4. Other Insurance Benefits. The employees' participation in other employer-sponsored insurance plans, such as basic group term life, death and disability insurance, will be maintained and funded by employer during Service. For purposes of supplemental life insurance employee will receive a \$100 maximum per month credit, provided by the respective Missionary or Temple Department for which they are performing Service. Other personal insurance plans or benefits, such as home owners insurance, will be the sole responsibility of the employees.

5. Release and Return to Work. Upon return from Service to Church employment, employees will be given the same or a reasonably comparable position (provided they continue to meet employment requirements). If a

position of the same or greater level is not available, the pre-service grade level is preserved until a position with a level equal to the one left behind for which the individual qualifies is found. If, after two years, no such position has been found the employee's level is reduced to the level of the position occupied. Regarding salary increases--the returning employee will receive a salary increase equal to the better of the average merit while serving or their pre-service compa-ratio (with the exception of salaries over the maximum of the range). If the returning employee's new level is higher than the departure level, a promotion increase may be given in addition to the increase just described in accordance with promotions guidelines found in existing policy. Exceptions may be necessary depending on returning employee country location. All other treatment of compensation will follow existing policy.

6. Funding of employee benefits while on assignment will come from the Area or Department where they were working prior to their assignment.

7. Exceptions to this policy will be determined by Central HR.

*c. Tabernacle Choir, Orchestra at Temple Square and Temple Square Chorale:* Fully benefited employees serving as members of the Tabernacle Choir, Orchestra at Temple Square, or Temple Square Chorale will be permitted time off with pay during normal working hours for scheduled choir, orchestra and chorale assignments. Additional time beyond that needed for scheduled assignments should be taken as annual leave or leave without pay.

d. General board or Church headquarters committee members: Fully benefited employees who are members of Church general boards or Church headquarters committees may receive up to seven days per year of paid leave if required for board or committee assignments, provided the employee does not receive pay for the assignment (e.g., getting paid for being in a Church film) and provided the assignment cannot be completed outside of normal working hours.

e. The portion of the employee's normal workday that is spent on Church assignment leave (except Church Assignment Leave of Absence without pay) will be paid leave and will be considered as time worked for computing overtime.

## **2. Funeral Leave**

a. Fully benefited employees will be allowed necessary time off with pay, up to three days, to attend the funerals of close relatives. The following are deemed "close relatives":

- Spouse
- Child
- Grandchild
- Parent
- Father- or mother-in-law
- Sibling
- Any relative (blood, step, or in-law) who at death was living in the home of the employee.

Funeral leave is a benefit to assist employees in responding to the loss of a loved one. It is not an entitlement.

b. Fully benefited employees will be allowed up to one day off with pay to travel to and attend the funeral of any other relative (blood, step, or in-law).

c. Time taken to attend funerals of those other than relatives should be taken as annual leave or leave of absence without pay (employee reasons) and should be scheduled with the employee's immediate supervisor as far in advance as possible.

d. Funeral leave will be considered as time worked for computing overtime.

## **3. Jury Duty Leave**

a. Employees called to jury duty or subpoenaed as witnesses in court trials will be granted time off to fulfill their responsibility.

b. Fully benefited employees will receive full pay for the time they are absent from work and may retain any money paid by the court.

c. Jury duty leave will be considered time worked for computing overtime.

d. Employees wishing to appear voluntarily in court as a witness must schedule the time in advance with

their immediate supervisor. The time should be taken as annual leave or leave of absence without pay.

e. Absence to appear in court as plaintiff or defendant does not qualify for jury duty leave under this policy. Such time must be taken as annual leave or leave of absence without pay.

## **4. Marriage Leave**

a. Employees who have been in benefited employment for at least 12 months who marry and continue employment following their marriage are eligible for two days of marriage leave with pay. Any additional time off should be taken as annual leave or as leave of absence without pay (employee reasons).

b. Marriage leave is not available for employees to attend the marriages of children or other family members.

c. Time spent on marriage leave will be considered as time worked for computing overtime.

## **5. Part-Time Public Service Leave**

a. An employee is eligible for part-time public service leave if the employee has completed a minimum of one year of employment with Employer and the public office will not negatively affect the employee's work.

b. Campaign activities must not interfere with work assignments. Employees must not campaign for office while at work. Employer's facilities may not be used to obtain lists of names or other information for a political campaign nor may Employer's facilities be used to distribute campaign literature or to promote votes. Employer's supplies, equipment and/or employees may not be used for political activities.

c. If an employee is appointed or elected to a part-time public office, he or she may be granted up to five days a year of leave time with pay, which will be counted as hours worked. Employees may retain any pay received for part-time service. The employee's department management must approve the employee's decision to seek office if the employee is to receive leave with pay. For leave in excess of five days a year, an employee is to use his or her annual leave. In exceptional cases, leave in excess of five days a year may be approved as leave of absence without pay (only after

the employee has exhausted his or her annual leave). If an employee requests 30 days or more of public service leave, his or her department management and the managing director of the Human Resource Department must approve the request before the leave begins.

d. Any outside assignments, activities, or committee meetings should be scheduled after regular working hours. If this is not possible, permission must be obtained from the employee's department management before participating in these activities. Time spent counts toward the five days' leave referenced above.

e. Employees will accrue both sick and annual leave while on approved part-time public service leave.

#### **6. Emergency or Weather-Related Leave**

a. Occasionally, inclement weather, power failures, or other natural disasters may prevent employees from traveling to work or may result in them being sent home early. The Human Resource Committee must authorize closure of offices in the Salt Lake Valley in such circumstances. The Human Resource Department will apprise other Church departments whenever closure of Salt Lake Valley offices has been authorized. Appropriate local management will decide when inclement weather or other situations necessitate closure of offices outside the Salt Lake Valley.

b. Fully benefited employees will be paid as if they had worked their scheduled shift. The time will be counted as hours worked.

c. Non-benefited employees sent home early from work will be paid for three hours or the hours actually worked, whichever is greater. Non-benefited employees are not paid if they cannot get to work.

d. Department management will evaluate the emergency circumstances of individual employees that result in varying arrival and departure times.

#### **7. Other Leaves**

a. The laws of the states where Employer does business may provide for leave in other situations, such as leave for victims of domestic violence to obtain restraining orders and leave for victims of crimes to appear in court. Employer's policy is to comply with both the letter and the spirit of such laws.

b. An employee departing to serve a full-time mission (other than as a mission or temple president) will need to be terminated from employment.

#### **4.2 Military Leave**

Employees who apply to the uniformed services to perform active duty or initial active- or inactive-training duty or for any other service in the uniformed services, whether voluntary or called to active duty, other than periodic training assignments (see below) will be placed on military leave of absence with pay (M-LWP) for up to two years of cumulative service over the course of the employee's career in Church employment. If an employee's active duty term exceeds two cumulative years, the employee will be placed on military leave of absence without pay (M-LWOP).

A fully benefited employee who has periodic military training assignments (inactive duty) may be placed on military leave with pay (M-LWP) for up to 15 working days per calendar year. For training assignment leave in excess of 15 days, the employee may choose to take the time as annual leave (if available) or as M-LWOP. A non-benefited employee who has periodic military training assignments will be placed on M-LWOP.

##### **Pay during Leave**

Employees going on M-LWOP will be paid through the day prior to the day their M-LWOP begins. If that day is a day before a paid holiday, the employee will be paid for the holiday.

When military leave with pay is approved, the employee will be paid the difference between his or her regular salary and the salary paid by the military unit (base pay plus allowances), provided the pay received from Employer is the greater of the two. The military pay voucher (or certified letter verifying the amount of an employee's military pay) should be taken to Payroll Services in the Finance Department for calculation of leave pay.

##### **Benefits during Leave**

1. Employees on military leave with pay (M-LWP):

a. *Sick and annual leave:* An employee's sick and annual leave balances will be maintained until the employee returns to full-time employment. The

employee will not accrue additional sick or annual leave while on M-LWP because their leaves will be provided according to military policies.

*b. Medical and dental coverage:* If an employee is enrolled in one of Employer's medical and dental insurance plans, the employee and enrolled family members may keep those benefits for up to 24 months or the duration of the employee's active duty assignment (plus the time allowed to apply for reemployment), whichever is shorter. As long as the employee is on M-LWP, Employer will continue to pay its share of the premiums for these plans. For employees on active duty, Employer's coverage becomes secondary to government insurance on the day the employee is activated. For dependents, Employer's coverage continues to be primary and the government insurance is secondary.

*c. Life insurance and disability:* Supplemental Group Term Life Insurance and 24-Hour AD&D coverage continue while the employee is on M-LWP and will continue until midnight of the last day of the month in which an employee begins M-LWOP. Group Term Life Insurance and Disability may be continued in the same manner as the medical and dental insurance (see above). War exclusion provisions apply to all coverage. Any disability resulting from injury or illness contracted while in military service will not qualify the employee for Employer's disability benefits.

*d. Thrift Plan:* The employee may contribute to the thrift plan, based on the differential pay being received from Employer (providing there is net pay left after deductions for taxes and insurance benefits). Employer will base its matching amounts on the differential pay. If the employee desires to make thrift plan contributions based on his or her military pay, the employee may do so either as an ongoing contribution or as a makeup contribution (as set forth below in the section on reinstatement). Contributions based on military pay will be subject to the same employer match as if those contributions were made during active employment.

*e. Accrual of retirement credit for fully benefited employees on military leave:* The time that a fully benefited employee spends on approved military leave of absence with or without pay will be counted to determine the years of service for retirement purposes, including vesting and benefit rate accrual. Time spent

performing service in the uniformed services will not be treated as a break in service for retirement purposes.

## 2. Employees on military leave without pay (M-LWOP)

*a. Annual leave:* Employees may choose to save unused vested annual leave or may make a written request for a lump-sum payout of their unused vested annual leave. This payment will be included with the employee's final paycheck. If military leave begins before the last day of the pay period, the employee will be paid for the prorated amount of leave earned through the last day he or she worked before going on M-LWOP. Upon returning from M-LWOP, time spent on M-LWOP by a fully benefited employee will be counted in determining the rate at which the employee accrues annual leave.

*b. Medical and dental coverage:* If an employee is enrolled in one of Employer's medical and dental insurance plans, the employee and enrolled family members may keep those benefits for up to 24 months or the duration of the employee's active duty assignment (plus the time allowed to apply for reemployment), whichever is shorter. During the first three months of M-LWOP, Employer will pay its share of the premiums. The employee must make arrangements through his or her department to pay the employee portion of the premiums. During the next 21 months, if continued coverage is desired, the employee is responsible to pay the entire insurance premium (both the employee's and Employer's portion).

For employees on active duty, Employer's coverage becomes secondary to government insurance on the day the employee is activated. For dependents, Employer's coverage continues to be primary and the government insurance is secondary. As long as premium payments are made, Employer's coverage will continue until midnight on the last day of the last month in which the employee is on active duty or for 24 months, whichever is shorter. If an employee or dependent is in the hospital on the date that benefits terminate, the employee may extend benefits under Employer's medical and dental plan solely for the injury or illness being treated. (In this case, the employee continues to pay the employee's share of the premium and Employer pays its share.) Extended benefits for an employee will end on the date

of release from the hospital. Extended benefits for a dependent will end on the date of release from the hospital or 30 days from the date of termination of insurance eligibility, whichever is sooner.

*c. Life insurance and disability:* Supplemental Group Term Life Insurance and 24-Hour AD&D coverage continue until midnight of the last day of the month in which an employee begins M-LWOP. Group Term Life Insurance and Disability may be continued in the same manner as the medical and dental insurance (see above). War exclusion provisions apply to all coverage. Any disability resulting from injury or illness contracted while in military service will not qualify the employee for Employer's disability benefits. Payment of premiums for Supplemental Group Term Life Insurance and 24-Hour AD&D coverage is the responsibility of the employee.

*d. Thrift Plan:* An employee on M-LWOP may not contribute to the Thrift Plan. Money on deposit with the plan is subject to withdrawal limitations as described in the Thrift Plan section in the Deseret Mutual Benefit Administrators' Benefits Handbook. (See information on the Thrift Plan in the Reinstatement section below for provisions regarding making up contributions.)

*e. Savings Plan loans:* An employee on M-LWOP who has a Savings Plan loan may pay off the loan, mail in monthly payments, or delay payments until he or she returns to employment.

*f. Accrual of annual leave and sick leave during M-LWOP:* A fully benefited employee on military leave of absence without pay will not accrue sick leave or earn annual leave during the leave and will not be paid for holidays. The time spent on approved M-LWOP will be counted to determine the rate at which the employee accrues annual leave.

*g. Accrual of retirement credit for fully benefited employees on military leave:* The time that a fully benefited employee spends on approved military leave of absence with or without pay will be counted to determine the years of service for retirement purposes, including vesting and benefit rate accrual. Time spent performing service in the uniformed services will not be treated as a break in service for retirement purposes.

1. For an employee to be eligible for reinstatement following military leave, the following conditions must be satisfied:

a. Advance notice of the need for military leave must be given. The employee or an appropriate officer of the branch of the military in which the employee will be serving must provide advance notice (written or verbal) to the employee's supervisor of the need for military leave, unless notice is impossible, unreasonable, or precluded by military necessity.

b. The total for military leave does not exceed five years. With certain exceptions, the cumulative length of the current absence and all previous absences for military leave from the employee's position with Employer must not exceed five years.

c. The employee must return to work or apply for reemployment within the appropriate time (see section on time limits below).

d. The employee must have satisfactorily completed his or her military obligation.

2. The following time limits apply for employees returning to work or applying for reemployment following military leave:

a. Absence for fitness examination or military service of less than 31 days: Employees should report to work no later than the first regularly scheduled work period that falls eight hours after the employee returns home.

b. Military service of 31-180 days: Employees should submit an application for reemployment no later than 14 days after the service is completed.

c. Military service of 181 days or more: Employees should submit an application for reemployment no later than 90 days after the service is completed.

d. Hospitalization or convalescence: Employees who are hospitalized for or convalescing from an illness or injury incurred in or aggravated during the performance of military service should, at the end of the necessary recovery period, report for work or submit an application for reemployment according to the preceding time limits. Such period of recovery should not exceed two years.

## **Reinstatement**

3. The following time limits and conditions apply concerning the position to which employees will be reinstated after military leave:

a. Military service of 90 days or less: Employees will be reinstated to a position of employment according to the following order of priority:

1. The position the employee would have held if he or she had remained continuously employed, so long as the employee is qualified to perform the duties of the position or can become qualified after reasonable efforts by Employer; or
2. The position of employment held on the date of the commencement of the service in the uniformed services, so long as the employee is qualified to perform the duties of the position or can become qualified after reasonable efforts by Employer; or
3. If the employee cannot become qualified for either position described above for reasons other than a disability incurred during or aggravated by service in the uniformed services even after reasonable efforts by Employer, the employee will be reinstated to a position that is the nearest approximation to the positions described above (in the order of priority) that the employee is qualified to perform. The employee will receive full seniority.

b. Military service of 91 days or more: Employees will be reinstated to a position of employment according to the following order of priority:

1. The position the employee would have held if he or she had remained continuously employed or a position of like seniority, status and pay, so long as the employee is qualified to perform the duties of the position or can become qualified after reasonable efforts by Employer; or
2. The position of employment held on the date of the commencement of the service in the uniformed services or a position of like seniority, status and pay, so long as the employee is qualified to perform the duties of the position or can become qualified after reasonable efforts by Employer; or
3. If the employee cannot become qualified for either

position described above for reasons other than a disability incurred during or aggravated by service in the uniformed services even after reasonable efforts by Employer, the employee will be reinstated to a position that is the nearest approximation to the positions described above (in the order of priority) that the employee is qualified to perform. The employee will receive full seniority.

*c. Employees with a disability incurred during or aggravated by military service:* These employees will be reinstated to a position of employment according to the following order of priority:

1. The position the employee would have held if he or she had remained continuously employed, so long as the employee is qualified to perform the duties of the position or can become qualified after reasonable efforts by Employer to accommodate the employee's disability; or
2. Any other position that is equivalent in seniority, status and pay, so long as the employee is qualified to perform the duties of the position or can become qualified to perform the duties of the position with reasonable efforts by Employer; or
3. If the employee cannot become qualified for either position described above, even after reasonable efforts by Employer, the employee will be reinstated to a position that is the nearest approximation to the position referred to in item 2 above in terms of seniority, status and pay.

4. The following conditions apply to the restoration of benefits to fully benefited employees returning from M-LWOP:

*a. Sick leave:* Unused sick leave accumulated prior to M-LWOP will be restored upon the employee's return to active employment. If the employee went on M-LWOP prior to the last day of a pay period, the employee will be given prorated credit for the days he or she worked during the pay period before beginning M-LWOP. The employee will begin accruing sick leave as of the first day back to work.

*b. Annual leave:* The employee will begin accruing annual leave on the first day back to work. Time spent on military leave will be counted in determining the rate

of accrual of leave.

*c. Medical and dental coverage:* Employer's medical and dental plans will be effective the first day of the month following the employee's return to work from M-LWOP. Preexisting condition provisions will be waived if the employee:

1. Makes application for reemployment within the time limits for returning to work described above and
2. Enrolls in the plan within 30 days after returning to work.

*d. Life insurance and disability:* The employee becomes eligible for Group Term Life Insurance, Supplemental Group Term Life Insurance, Disability and 24-Hour AD&D coverage upon return to employment with Employer. It is not necessary for the employee to provide evidence of insurability if he or she:

1. Was enrolled in the plan prior to M-LWOP (under the Disability plan, the employee must be enrolled for two years before preexisting conditions are covered),
2. Makes application for reemployment within the time limits for returning to work described above,
3. Enrolls in the plan within 30 days after returning to work and
4. Enrolls for the same coverage or less than that held prior to M-LWOP.

*e. Thrift Plan:* Upon return to employment, an employee may immediately enroll in the Thrift Plan. Employees have the opportunity to make up the 401(k) contributions missed while serving on active military duty and receive Employer's match for those make-up contributions.

5. The following conditions apply to the termination of employees who have returned from M-LWOP and were reinstated. No employees reinstated to employment under the terms of this policy should be terminated from their position without cause:

a. Within 180 days after the date of reinstatement if the employee served in the uniformed services for 31 to 180 days, or

b. Within one year after the date of reinstatement if the employee served in the uniformed services for 181 days or more.

## 4.3 Holidays

Employer provides fully benefited employees with paid time off to observe certain local and national holidays. Non-benefited employees do not receive holiday pay.

The annual holiday schedule for the United States is established and distributed by the Human Resource Department. Observed holidays usually include:

- New Year's Day
- Dr. Martin Luther King Jr. Day
- Presidents Day
- Memorial Day
- Independence Day
- Pioneer Day
- Labor Day
- Thanksgiving (two days)
- Christmas (two days)

Temple employees will observe the same number of holidays as other employees. Because of the operating schedules of the temples, the actual dates may vary by year and by temple. The Temple Department will approve the holiday schedule for each temple. Holidays for countries other than the United States will be established in accordance with local laws and customs.

To be paid for a holiday, employees must work or be on approved paid leave the workday before and the workday following the holiday, unless they are terminating their employment.

Terminating employees whose last day of work is the day before a holiday will be paid for a holiday only if the holiday is the last day of the workweek in which they terminate. Any exceptions must be approved by the employee's manager.

Fully benefited employees whose regular work schedule is fewer than 40 hours per week will accrue a

prorated number of holiday hours.

Fully benefited employees who work a compressed schedule, such as four 10-hour days, will receive the same number of holiday hours as do employees working a traditional schedule. Holiday hours for such employees will be reported and tracked in full-day increments based on the employee's usual workday. The holiday schedule for employees on compressed schedules will be set by management, with the employee's agreement, according to the following guidelines:

1. The employee will receive a sufficient number of holidays such that the employee's total number of holiday hours is approximately the same as for employees who work a traditional five 8-hour-days schedule, e.g. 88 hours (11 holidays at 8 hours each).
2. If an observed holiday falls on the employee's regularly scheduled workday, that day will be the employee's holiday unless operational needs mandate that the employee work the observed holiday. See provisions below regarding benefited employees who work on holidays.
3. If the number of observed holidays that fall on the employee's regularly scheduled workdays is less than the number of holidays to which the employee is entitled, department management, with the agreement of the employee, should schedule alternative holidays.
4. If the number of observed holidays that fall on the employee's regularly scheduled workdays is greater than the number of holidays to which the employee is entitled, department management, with the agreement of the employee, should determine which regularly scheduled holidays will not be observed by the employee.

Example: A fully benefited employee is regularly scheduled to work Monday through Thursday for 10 hours each day. He or she would be provided nine holidays, (nine holidays at 10 hours each). Using the 2009 United States holiday schedule, six observed holidays fall on the regularly scheduled workdays (New Year's Day, Martin Luther King Jr. Day, Memorial Day, Labor Day, Thanksgiving Day and Christmas Eve). The employee would receive three additional holidays,

which would be "floating holidays," to be scheduled at the mutual convenience of the employee and operational needs.

Holiday hours will be considered as hours worked for computing overtime.

If a fully benefited employee works on a holiday or if the holiday falls on his or her regularly scheduled day off, department management should schedule an alternative holiday (day off) for that employee. This alternative holiday should be within 30 days of the original holiday. With the employee's agreement, in lieu of an alternative holiday, the department may pay holiday pay plus the employee's regular pay. In such a case, both the actual hours worked and the holiday hours will be considered hours worked when computing overtime pay.

## **5. Employment Actions**

### **5.1 Transfer and Promotions**

Employees are selected for promotion or transfer based on Employer's needs, organizational strategy and the employee's performance, qualifications, ability, attitude and interest. Employees are encouraged to develop and increase their ability to perform their present job and to acquire skills that make them candidates for transfer or promotion. Employees may apply for an available job by completing an internal job application available on Employer's Web site. Either management or the employee may initiate discussion of a transfer.

#### **Internal Transfers**

An Internal Transfer is defined as the movement of a regular full-time or part-time employee from one position to another, without a break in employment of 30 or more days, whether within the same grade level, the same department, or to another department. Management must consult with HR prior to any Internal Transfer, particularly if it is accompanied by a salary increase.

Employees must have completed a minimum of one year of service in their current position to be considered for an Internal Transfer. Exceptions require the prior written approval of the second-level or higher manager



in the current department.

In addition to experience, skills, and qualifications, eligibility for an Internal Transfer ordinarily depends on successful performance in the current position. However, employees struggling in their current position can be considered for a different position for which they may be better qualified. All employees are subject to the standard selection process for any Church position for which they apply.

All position openings should be approved by department or area HR before posting and should be posted online and otherwise as determined by prescribed HR practices. Hiring managers should consult HR with any questions regarding the hiring process.

### **Promotions**

While a promotion is usually initiated by the employee's supervisor, all promotions through grade 99 require the approval of at least two levels of supervision and the department human resource director or manager.

Appointments to managing director positions will be announced by the appropriate General Authority or Executive Council. Department heads are responsible for announcing appointments of employees to director positions within their departments.

### **Transferring Employees Serving as Ecclesiastical Leaders**

See the "Hiring or Transferring Ecclesiastical Leaders" section in "General Conditions of Employment."

### **Transferring from Other Organizations Covered by DMBA**

Employees who transfer to or from affiliated corporations that participate in the employee benefit programs administered by Deseret Mutual Benefit Administrators (DMBA) may, with approval of the department human resource director or manager, transfer benefits according to the following guidelines:

1. The employee's hire date with the previous employer will continue to be the hire date for life insurance benefits, retirement benefits, health insurance

benefits, annual leave accrual rate and other benefits as identified.

2. Benefit and vesting credits earned with the previous employer will transfer to the new employer.

### **Relocation of Employees**

Employer will assist certain employees with the usual, customary and reasonable costs associated with relocation necessitated by accepting a new position, transfer, or promotion. The details of relocation assistance, including the specific level of available assistance, are found in the applicable relocation policy. The department for which the employee will work is responsible for determining the actual amount of assistance to be offered to an employee.

Eligibility for relocation assistance is determined by the following guidelines:

1. The distance from the employee's former house to the new workplace must be at least 50 miles greater than the distance from his or her former house to his or her former workplace.
2. The relocation of a current employee must be for the benefit of Employer and not an accommodation for or to the employee.
3. The new employee must be recruited by Employer.

### **5.2 Corrective Action and Termination**

Employees are evaluated on their performance and behavior. Managers and supervisors should treat every employee with dignity and respect, even if corrective action is necessary. Corrective action should be handled in an orderly but direct and honest way, thereby allowing the employee the opportunity, if applicable, to improve unsatisfactory performance or behavior. (See D&C 121:41--44.)

It is not required, but corrective action may follow a progressive path including coaching, verbal warning, written warning, probation, suspension and termination. The level of corrective action to be applied will depend on many factors, including the nature of the offense, past violations by the employee, if any, and length of service. The goal is to allow the employee an early opportunity, if appropriate, to modify performance or behavior so as to avoid more serious

disciplinary action. The decision regarding the kind of corrective or disciplinary action to be taken, up to and including termination is in the exclusive judgment of Employer. Employment with Employer remains at will. Nothing in this corrective action policy diminishes the at will policy, which means that either the employee or Employer may terminate the employee's employment, with or without notice and with or without cause.

Coaching and verbal warnings are usually conducted by the employee's immediate supervisor. Supervisors should be direct in their comments without being unkind or degrading. Specific examples of unacceptable performance or behavior should be cited.

As circumstances dictate, management may issue a written warning. Warning letters should be prepared by the supervisor with the assistance of the department's human resource representative. Warning letters should list specific details of the unsatisfactory work performance and/or unsatisfactory behavior and should identify the desired performance or behavior. The letters should also contain suggestions to the employee on how he or she can make the required changes and how the supervisor will assist the employee.

A warning letter should be delivered to an employee by his or her supervisor and, if possible, the department's human resource representative. The employee should be given a copy of the letter and should be asked to sign the original, indicating that he or she has received and read the letter. The employee's signature does not indicate agreement with the contents of the warning letter.

### **Probation and Suspension**

In cases judged by Employer to involve serious misconduct, serious performance issues, or failure to improve performance or behavior after prior corrective action, an employee may be placed on formal probation. In cases of serious misconduct (not including poor performance), the probation may be accompanied by a defined period of suspension without pay. Disciplinary probation may be imposed for a period of up to 90 days.

Employees should be given written notice of the conditions of the probation, the specified standard of performance or behavior to be attained by the employee and the length of the probationary period. If suspension

is being imposed, the length of suspension must be included in the probationary letter. The employee should be asked to sign the original probation letter, indicating that he or she has read and understands the letter and has received a copy. The employee's signature does not indicate agreement with the contents of the letter.

Normally, a probationary period will not extend more than 90 days. In certain positions, especially exempt positions, a longer period may be necessary to establish that a change in performance has occurred. During the probationary period, the supervisor should meet regularly with the employee to discuss progress toward the expected standard of behavior or performance. If progress is not being made, the employee may be terminated at any time during the probationary period.

At the end of the probationary period, the supervisor and a human resource representative should meet with the employee. If the employee has not satisfied the terms of the probation or has not made satisfactory progress toward meeting the terms of the probation, the employee should be terminated. If satisfactory progress has been made but the terms of the probationary period have not been fully met, the probationary period may be extended for a period, usually no more than 45 days. If the terms of the probation have been accomplished, the probation should be ended, with a reminder to the employee that he or she must continue to work or behave at a satisfactory level in order to avoid further corrective action or termination.

### **Termination**

Termination may be imposed when an employee engages in conduct inconsistent with the standards of Employer or if an employee who has received prior corrective action fails to make satisfactory progress toward meeting the expected levels of performance or behavior. Involuntary terminations are approved by the department's human resource director or manager and the department's line manager, division director, or department managing director.

Involuntary terminations, including those on temple worthiness grounds, should be reviewed in advance with the Director, Human Resource Legal Services.

If an employee who serves as an Area Seventy, a member of a stake presidency, or a bishop is being terminated involuntarily, the Human Resource Department should notify the Office of the Quorum of the Twelve, the Office of the Seventy, or the stake president, as appropriate.

### **Records of Corrective Action**

Documentation of corrective action should be placed in an employee's file. From time to time the employee's file should be purged of corrective action documentation if, in the judgment of Employer, such documentation no longer is necessary for administration of the employment relationship.

### **Behavior Prompting Corrective Action**

It is not possible to make a comprehensive list of behavior that may prompt corrective action, including termination, but examples of such behavior like those listed below may be instructive. An employee may receive corrective action, including termination, if he or she:

1. Does not meet required performance standards.
2. Performs employment-related duties carelessly or inefficiently.
3. Is careless or does not attend to employment-related duties, resulting in a waste of materials or loss of or abuse of tools and equipment.
4. Fails to comply with Employer's standards of conduct, including the requirement to be worthy of a temple recommend.
5. Engages in inappropriate or dishonest workplace behavior, which may include, but is not limited to, the following:
  - a. Destroying, abusing, stealing, or improperly using Employer's property.
  - b. Intentionally falsifying records, including time reports.
  - c. Being negligent in performing duties, resulting in or creating the possibility of injury to persons or damage to Employer's property.
  - d. Engaging in behavior that is detrimental to the

work effort, such as excessive absence, refusal to work, insubordination, persistent tardiness, leaving work without authorization before quitting time, failure to perform assigned tasks, unauthorized extension of lunch and break periods, or similar actions deemed inappropriate by Employer.

- e. Disclosing or failing to secure confidential information.
- f. Misrepresenting or withholding pertinent facts in securing or retaining employment.
- g. Making false or misleading statements concerning one's own conduct or making false or misleading allegations of harassment or misconduct by another.
- h. Misrepresenting or withholding pertinent facts in responding to an internal investigation.
- i. Offering, soliciting, or accepting a bribe or kickback.
- j. Misusing leave benefits.
- k. Disrupting the work of other employees, including harassment or sexual harassment.
- l. Violating the conflict of interest policy.
- m. Making malicious, false, or derogatory statements or engaging in any other conduct that may damage the integrity or reputation of Employer, its employees, or The Church of Jesus Christ of Latter-day Saints.
- n. Loafing, loitering, or sleeping during work hours.
- o. Failing to immediately report any on-the-job injury or accident involving Employer's equipment, property, or employees.
- p. Failing to observe safety and security regulations and instructions.
- q. Bringing a firearm or other weapon to the workplace or onto Employer's property or engaging in threatening or violent behavior.
- r. Violating the No Harassment or Discrimination policy or No Retaliation policy.

## **5.3.Employee Appeal Process**

Employees should feel comfortable discussing work-related concerns with their immediate and next-level

supervisors. Each employee has the opportunity for a prompt, impartial review of work-related concerns through proper management channels. Work-related concerns should be resolved at the lowest possible level in the organization, usually with the employee's immediate supervisor. Employees should not seek General Authority involvement.

### **Review of Significant Adverse Employment Actions**

Decisions involving significant adverse employment actions (i.e., involuntary termination, suspension, formal work-related probation, or involuntary demotion or transfer to a lower grade) may be appealed. Absent extraordinary circumstances, the employee should initiate a written appeal within fourteen (14) calendar days of being notified of the adverse employment action.

The appeal should be directed to the highest non-General Authority level of management in the employee's department (usually the managing director, the director of temporal affairs, or equivalent). The employee initiates an appeal by submitting a written statement of the specific reasons he or she believes the decision reached by management is not correct or proper. Relevant documents should be attached to the written statement. After considering the employee's statement, the department head may meet with the employee and/or the employee's supervisors. The department's human resource representative or a member of the Human Resource Department may be present during any discussions with the employee. The department head should give the employee a written decision on the appeal.

Within seven (7) days of receipt of the written decision, the employee may request that the managing director of the Human Resource Department review an unfavorable response to his or her appeal. Unless new facts have come to light, the written appeal statement submitted to the department head will be the basis for the review. The Human Resource managing director may consult with his directors, the employee and the employee's supervisor, manager and managing director. The Human Resource managing director should give the employee a written response to the request for review. The Director, HR Legal Services acts as legal adviser at all stages of the appeal and review process. Employees

should not seek General Authority involvement in appealing adverse employment actions.

### **Other Work-Related Concerns**

Resolving work-related concerns other than significant adverse employment actions begins with the employee's immediate supervisor. The department's human resource representative is available to assist if the supervisor or employee so desires. Employees who believe that their supervisor is part of the concern may go directly to the next-level supervisor. If the concern is not resolved by discussions with the immediate or next-level supervisor, the employee may request a review of the concern by the department's director who has responsibility for the employee. (If the director is the first- or second-level supervisor and has been involved in prior resolution efforts, the employee may request that the managing director review the concern.) The department's human resource representative is available to assist if the employee requests such involvement. The decision of the director or managing director shall be final. Employees should not seek General Authority involvement in appealing work-related concerns.

This policy does not replace or supersede the complaint process set forth in the No Discrimination or Harassment policy. (See Our Standards of Conduct.) As set forth in more detail in that policy, employees may direct their complaints of harassment, discrimination, or retaliation to their immediate supervisor, their next-level managers, their human resource representative, or the Human Resource Department.

### **5.4. Letters of Recommendation**

Requests for letters of recommendation must be directed to the human resource director or manager of the department where the requesting employee or former employee last worked. The request should identify the position last held by the requestor and his or her last supervisor. The department's human resource representative will assist the employee's last supervisor in preparing the letter of recommendation. The Director, HR Legal Services should be consulted with any questions.

Individual employees responding to a personal acquaintance's request for a letter of recommendation must not use Employer's letterhead or express or imply

Employer's endorsement for the recommendation.

## **5.5.Reductions in Force**

As the Church grows, Employer is faced with the increasing emphasis on obtaining efficiencies in the manner in which work is performed within Employer's organizations. These efforts may result in reductions in force (RIF) for certain departments or divisions. Before any RIF, managers should contact the Human Resource Department to obtain current guidelines and appropriate approvals.

## **5.6.Retirement**

When an employee indicates a desire to retire, the department should notify the Benefits Office of the Human Resource Department as early as possible, preferably at least four months before the desired retirement date.

An employee's retirement benefits are governed by the terms of the Deseret Mutual Master Retirement Plan. An employee's insured benefits will be effective through the last day of the month in which the employee works. Noninsured benefits typically end on the last day worked. Unused, vested annual leave will be paid out upon retirement. Unused sick leave will not be paid out.

Departments may hold a reception for a retiring employee according to the following guidelines:

1. An employee retiring with 10 through 19 years of service may be given a reception hosted by and including the employee's division, with selected others within the employee's department also invited. The employee may also be given a letter of appreciation from the department or division head or from a member of field management.
2. An employee retiring with 20 through 34 years of service may be given a reception hosted by and including the employee's department, with selected others in other departments also invited. The employee may also be given a letter of appreciation from the First Presidency.
3. An employee retiring with 35 or more years of service may be given a reception hosted by the employee's department or organization, with selected others in other departments also invited. The employee may

also be given a letter of appreciation from the First Presidency. At Church headquarters, the letter will be presented by the General Authority adviser of the department. In locations away from Church headquarters, the employee's immediate supervisor or other department management may present the letter.

4. Retiring managing directors and other designated employees may be honored in the same manner as those retiring with 35 or more years of service.
5. Employer will pay reception costs through the employee's department or area operating budget.

## **5.7 Payment for Courses, Seminars, Licenses and Certificates**

Employer encourages and promotes self-improvement by its employees. Employees may be required to take certain courses or possess appropriate licenses and certificates if necessary for their job. Employer will pay the costs associated with such courses, licenses and certificates in the circumstances set forth below.

### **Courses and Seminars**

Employer will reimburse or prepay 100 percent of the authorized costs of a course, seminar, or convention that it requires an employee to attend. Authorized costs include appropriate travel, tuition, books and related fees. Employees should not be required or authorized to attend an outside course if a course that is substantially similar in content is offered in-house. Employer will not pay for a course or seminar if the employee receives financial aid for the course from any other source, such as veterans' benefits, scholarships and grants. If an employee receives partial payment for a course from another source, Employer will pay the difference between what the employee receives from the other source and the cost of the course. When an employee is required to take a college course, advance approval must be obtained from the employee's managing director.

### **Licenses and Certificates**

Employer will reimburse or prepay 100 percent of the cost of obtaining or retaining a license or certificate required for the employee's job.

## **Educational Reimbursement**

To assist employees in self-improvement, Employer has established a policy, subject to department budget constraints, of reimbursing fully benefited employees for up to 75 percent of tuition, books, equipment required for the course and customary and usual fees for educational courses the employee takes. Employees may be reimbursed for the costs associated with up to two courses per quarter or semester, not to exceed eight credit hours. The total reimbursement may not exceed the calendar year limits set out in the Internal Revenue Code. In addition to budgetary considerations, reimbursement is based upon the following factors:

1. The employee must:

- a. Be a fully benefited employee who has been employed more than six months.
- b. Be on the payroll at the beginning and at the end of the course.

2. The course must accomplish at least one of the following:

- a. Help develop skills that will improve the employee's performance in his or her current position.
- b. Help the employee qualify for other employment with Employer that realistically may become available.
- c. Help the employee maintain a license or certification that enhances the employee's work value to Employer.
- d. Lead to a college undergraduate or master's degree. Employees will not be reimbursed for courses necessary to meet the minimum requirements for their current position.

3. The employee must receive a grade of C or better for graded courses or a pass or completed designation for non-graded courses.

4. Courses must be taken from an accredited institution of higher education, as accredited by a regional agency of the Commission on Institutions of Higher Education.

5. Approval must be given for the course before the first day of class.

6. Employer will not reimburse an employee or pay for a course if the employee receives financial aid for the same course from any other source, such as veterans' benefits, scholarships and grants. (A repayable loan is not considered financial aid from another source.) If the employee receives partial financial aid from another source, Employer will pay the difference, up to 75 percent of the cost for tuition, books and applicable fees.

7. Courses should not be taken during the employee's normal workday. The employee's managing director may approve exceptions if there will be no adverse effect on the employee's work and if the employee arranges to make up time lost from work due to attending the class.

Educational reimbursements for some classes may be taxable. The employee is responsible for paying any such tax. Where the reimbursement for a class is taxable, the amount of the reimbursement will be added to the employee's annual tax report form.

## **6. Compliance and Privacy**

### **6.1.Compliance with the Laws of the Local Jurisdiction**

Employer is committed to conducting its business operations in compliance with the laws of the various jurisdictions where its operations are located. To the extent that any policy set out herein is in conflict with applicable local, state, federal, or national law, the policy will be superseded by the law.

### **6.2.Protection of Employee Privacy**

#### **Personnel Files**

To the extent possible and practical, Employer seeks to ensure the privacy of the personnel records of each employee. The Human Resource Department is responsible for establishing and evaluating the human resource record-keeping practices of all departments.

Generally, an employee's personnel file should contain the application for employment and any Personnel Action Forms (PAF), Employee Action Forms (EAF), Disclosure of Possible Conflict of Interest forms, Assignment of Work Products Agreement forms, performance appraisals, commendation letters and

notices and disciplinary notes and letters. Medical information, such as that submitted in support of a request for family or medical leave, must be kept in a separate file.

Employees have access to the above-described personnel file upon reasonable request and at reasonable times. Employees may respond in writing to any information contained in their files. These written responses will be included in the files.

Supervisors have access to all information in their employees' files, except for the medical information. Medical information may be accessed only upon establishment of an appropriate employment-related need.

Supervisors do not have access to the personnel files of employees outside their line of responsibility, except to obtain information on an employee who may be transferred into their line of responsibility. Employees in the Human Resource Department and department employees with human resource responsibilities may have access to the personnel files of all employees within the scope of their assignment.

To the extent appropriate, Employer will comply with any government investigation and will comply with both the spirit and letter of applicable laws regarding release of employee information to government investigators. Under government statute or regulations, access to an employee's personnel files will be granted to government agencies upon proper request. Employer will provide access to employee files in response to a proper subpoena. You should contact OGC promptly upon receiving a request from a government agency or official that either (a) is for Church Proprietary Information or (b) is not routine in nature. Any information provided to a governmental agency or official should be completely honest and truthful. Be sure that records relevant to the government inquiry are preserved.

## 7. Church-Service Missionaries

The vision of the Church-Service Missionary (CSM) Program is to:

- Enable members to use their talents in meaningful service to sustain the continued growth and progress

of Church operations worldwide and

- Ensure spiritual and productive mission experiences that bless those who serve and help souls come closer to Christ.

As the Church continues to grow, the operational needs for resources continue to increase as well. "Senior" members of the Church have many years of valuable professional and ecclesiastical experience combined with great faith and testimony. When matched to the right assignments, they bring extraordinary levels of expertise and commitment to the work. Young adults who have been "honorably excused" from full-time proselyting missions can also make great contributions. The proper use of the CSM program can also help reduce the need for increasing the number of employees, thereby saving some human resource costs. The CSM program is not intended to diminish the emphasis on full-time missionary opportunities or service in temples, ward or stake callings, etc.

### **Callings That Are Not Processed as Church-Service Missions**

"Callings to assist with activation efforts or to help strengthen members in wards are made by local [priesthood] leaders. These callings are not processed as Church-service mission calls. This guideline applies even if members will serve outside their home wards." *Handbook 1, Stake Presidents and Bishops, 2010, Section 4.12.10, p. 39*

### **Volunteer Service**

"Many opportunities for Church service are available for members, including those who do not hold a current temple recommend and for nonmembers. These individuals are volunteers rather than missionaries. Volunteers may serve in areas such as family history centers, FamilySearch indexing, welfare production projects and canneries and Scouting if qualified for Scout registration." *Handbook 1, Stake Presidents and Bishops, 2010, Section 4.13, p. 39*

As operations managers contemplate using Church-service missionaries, they should carefully consider the following:

- Work assignments must be meaningful and needed.

Do not use CSMs instead of designing your work processes for efficiency and results, or giving missionaries the work that no one else wants to do. Although missionary service is considered to be “free,” it costs the missionaries to serve as they pay for commuting, food, clothes and other expenses.

- Appropriately matching potential missionaries to the right work is the best way to ensure a positive and productive mission experience for both the missionary and the operation. The hiring manager and the potential missionary should invest the necessary time, effort and prayer to match his/her skills, abilities, interests and availability to the right assignment. Make sure the potential missionaries understand what the day-to-day work involves before arrangements are completed.
- While many things are similar, there are some differences between paid and non-paid resources so managers and supervisors must learn to effectively manage this “mixed workforce” that works together for common causes.
- Just as with employees, missionaries should clearly understand the needs and expectations of their assignment and receive the same orientation, training, tools and facilities needed for a successful and fulfilling experience. Aside from the obvious job training, this includes codes of conduct, safety, systems and building access, comfortable work environment, materials, emergency preparedness, who provides them with direction and support, etc. Each operation for whom the CSMs work is responsible to acquire their missionary badges.

### **Minimum Requirements for Church-Service Missionary Calls**

1. The assignment should report to a Church department and require an average of no less than eight hours per week for usually 6-24 months. Young CSMs (those “honorably excused” from full-time proselyting missions) are encouraged to serve as close to full-time as possible.
2. Missionaries must be temple worthy (do not have to be endowed unless the assignment requires it).
3. Missionaries must be physically, mentally and

emotionally able to perform the specified duties.

4. Missionaries should be capable of supporting themselves financially, which includes normal commuting and any medical, dental or insurance needs. If a vehicle is necessary to do the assigned work, one may be made available by the sponsoring department or the missionary may be reimbursed for use of his or her personal vehicle. Other required travel expenses, including airfare, should also be covered by the department.
5. Missionaries should be the same minimum age as required for full-time proselyting missions (18 for men, 19 for women).
6. Couples serving together and individuals with young children at home should not be called.

### **Ecclesiastical Leadership**

In most cases, the stake president and bishop of the stake and ward in which the missionaries reside are the ecclesiastical leaders. Their membership records remain in that ward, they pay their tithes and other offerings there and their temple recommends are renewed by those leaders. Church-service missionaries are encouraged to serve in ward, stake, temple or other callings at the discretion of local leaders if they do not interfere with their CSM assignment.

### **Obtaining Church-Service Missionaries**

There are several channels through which CSMs may be obtained:

- In North America, the Presidency of the Seventy instituted the annual “Coordination Process” which is administered by the central CSM office. CSM and volunteer needs for the following year are gathered from Church operations by the local CSM Coordinators who then assign them to the appropriate stakes. Individual, direct requests from operations to local priesthood leaders outside of the Coordination Process are discouraged. Contact the local CSM Coordinators or the central CSM office for more information.
- Church operations in North America should post their open positions on the CSM opportunities website on [lds.org](http://lds.org). Lists of opportunities for specific



geographic areas can be printed from this website for posting on meetinghouse bulletin boards, etc.

International areas may have individual “country sites” that may have a missionary opportunities section. The contact information of the hiring manager is included on each posting so that interested members may inquire for more details.

- Networking through current and former CSMs, family, friends and ward/stake members can also be effective.
- A significant number of Church members proactively seek out available service opportunities, through CSM opportunity websites, family and friends, local priesthood leaders, etc.
- Other LDS organizations and websites can sometimes be a resource as well.

### **Recommendation and Interview Process**

The bishop (also includes branch presidents), the interested member(s) and the operations manager must all be in agreement that the member’s skills, interests and availability match well with the CSM need. The member then fills out the Recommendation for Church-Service Missionary form. Please make sure the form is filled out accurately and completely. The bishop signs it verifying his endorsement and the member’s worthiness of a temple recommend. The stake president (also includes district presidents) must also approve of the call, reaffirms temple worthiness and signs the form. The form is then sent to the local CSM Coordinators or the CSM office at Church headquarters as appropriate. In international areas, the Area HR Office typically processes the calls and releases.

### **Mission Calls**

Once the recommendation form has been processed, a mission call letter is sent to the stake president, who formally issues the call and instructs the bishop to set the missionaries apart. If for some reason, the call is not accepted, the stake president should notify the bishop and Church operation. Church-service missionaries are not trained at a Missionary Training Center.

### **Mission Extensions**

Near the end of the mission, a decision may be made

to extend the call for varying lengths of time if (a) the work assignment is still needed, (b) the missionary's stake president approves and (c) the missionary wants to continue serving in the same assignment.

If all three of the above are true, whoever processed the original mission call can extend the release date in their missionary database. It is essential that this is done at least one month prior to the original release date so that a release letter is not sent by mistake.

### **Mission Releases**

When a CSM is released, a certificate of thanks is sent to the stake president, which he presents to the missionary. He should then notify the bishop and suggest that the missionary be given opportunities to speak about his/her mission experience in the appropriate meetings.

### **Additional Information**

A Church-Service Missionary web portal can be found on the Church’s intranet which contains much more detail about the CSM program policies, processes, multimedia resources, forms, articles, computer applications, training materials, etc. Additional questions can also be addressed by the local CSM Coordinators, Area HR staff or the CSM Office at Church headquarters.

### **Church-Service Missionary Coordinators**

The Church-Service Missionary organization consists of a central program office in the HR department at Church headquarters, CSM Coordinators located throughout North America and Area HR Managers, staff and coordinators in international areas. Coordinators in the field provide training and support to local operations managers, priesthood leaders, missionaries and members.

As needed, Church departments may have an individual or couple to coordinate Church-service missionary (and volunteer) efforts for their department. These coordinators may be Church-service missionaries themselves and would work with the appropriate CSM program coordinators and HR staff.

The central program office provides training, content, tools and support and can be reached at 801-240-4914

and csm-support@ldschurch.org. Operations and local priesthood leaders in international areas should contact their Area Human Resource Manager for assistance.

## 8. Vehicle-Use Policy

Employer provides fleet vehicles for use by its employees under specific circumstances so that they may more effectively carry out their assigned tasks. All vehicles are to be operated in a safe and law-abiding manner by a driver with a valid driver's license for the area where the vehicle is to be driven.

### Assigned Vehicles

Assignment of a vehicle are approved in writing by the employee's headquarters functional department head. Fleet vehicles may be assigned if any of the following conditions are met:

1. *Mileage-justified:* A vehicle may be assigned to an employee when his or her normal job duties require sufficient travel to justify the cost of Employer buying a vehicle rather than using the motor pool, renting a vehicle, or reimbursing an employee for using a personal vehicle.

2. *Position-justified:* A vehicle may be assigned to an employee when normal job requirements cannot be accomplished by using a motor pool vehicle due to special equipment requirements or significant geographical separation from the motor pool location.

3. *Benefit-justified:* A vehicle may be assigned to an employee as a benefit based on common practice as part of his or her compensation. A benefit-justified vehicle must be approved by the benefits committee.

4. *Expatriate:* A vehicle may be assigned to an expatriate employee.

### Motor Pool Vehicle Use

1. Motor pool vehicles should be used as the primary vehicles for business needs when public transportation is not available, unless the business miles driven by an individual are in excess of the annual amount needed to justify an assigned vehicle.

2. Employee use of a motor pool vehicle for official business requires authorization from an approved supervisor or manager and a reservation with the motor

pool office.

3. Motor pool and department pool vehicles are not to be used for any personal purposes.

4. Employees and Church-service missionaries provide their own transportation to and from their places of assignment. Once there, if a vehicle is needed to do the assigned work, a motor pool vehicle may be made available upon proper authorization.

5. The driver of a motor pool vehicle is responsible for returning the vehicle full of fuel and clean inside and out and for reporting any damage or problems to the motor pool coordinator.

### Non-business Use of Assigned Vehicles

1. Mileage- and position-justified vehicles may *not* be used for personal use. The assigned driver is the only authorized driver.

2. Benefit-justified and expatriate vehicles may be used for personal use and may be driven by all immediate family members who have a driver's license that is valid in the area where the vehicle is being driven.

### Safe Driving Practices

The primary responsibility for safely operating any vehicle lies with the individual driver. It is required that all employees, volunteers and missionaries obey all traffic laws, signs and signals and adhere to the following safety guidelines while driving.

1. The driver and all passengers wear shoulder and lap safety belts when the vehicle is in operation.

2. The driver has a current and valid driver's license.

3. The driver respects and follows all applicable laws.

4. The driver does not use any handheld device, such as a cell phone, personal digital assistant (PDA), or laptop computer. If allowed by law, cell phones operated with hands-free equipment may be used.

5. The driver refrains from all distracting practices, including:

a. Eating and drinking,

b. Reading and writing and

c. Grooming.

6.All needed repairs to Church vehicles are made in a timely manner in order to prevent incidents or additional damage.

7.Accidents should be reported to Church Fleet Administration and the driver's supervisor within 24 hours.

8.Traffic and parking tickets are taken care of by the driver immediately.

9.The preventive maintenance schedule is followed for both time and mileage.

Additional details may be obtained by calling Church Fleet Administration at Church headquarters.

## **Vehicle Expenses**

Employer will pay for the purchase, licensing, title, insurance, maintenance, repair and servicing of all fleet vehicles. Tickets, fines and tows are the responsibility of the individual driver. Fuel costs are handled as follows:

1.*Motor pool vehicles:* All fuel is covered with a fuel card.

2.*Mileage- and position-justified vehicles:* The employee will be reimbursed for fuel purchases.

3.*Benefit-justified and expatriate vehicles:* The employee will purchase all fuel. If the vehicle was used for business purposes, the employee applies for a reimbursement from Employer at the approved gasoline-reimbursement rate.

4. *Commuting-only vehicles:* Employer will purchase the fuel.

### **Fleet Vehicles Authorized for Commuting Only**

A fleet vehicle may be authorized to be taken home by an employee only in unusual circumstances, where there is a danger of vandalism to the vehicle if it is stored overnight on business premises or there are no facilities for safe storage on or immediately near the premises. Proper authorization of senior management must be received before the vehicle is justified to be used for commuting. No personal use is allowed in this

situation and the employee must record and report the number of commutes taken annually. The value of these commutes will be added as part of the employee's income.

## **Income Tax Reporting of Personal Use of Fleet Vehicles**

Each driver needs to report all personal use of fleet vehicles to payroll services. Payroll services and the tax division will determine how to handle the appropriate tax requirements. This includes drivers of benefit-justified and expatriate vehicles. Drivers using commuting-only vehicles need to report the number of commutes to payroll services. It will be reflected on the employee's W-2 form.

## **9. Travel Policy**

This policy is the global minimum travel policy. Area offices and departments may implement policies that are stricter than this policy for employees and workforce only. Workforce includes all employees, volunteers and Church service missionaries. Travel policies for full-time missionaries are managed by the Missionary Department. General Authorities travel policies are managed by the Office of the Presiding Bishopric. This policy does not replace any existing travel policies that pertain to General Authorities, missionaries or mission president travel. Information regarding expatriate travel is addressed in the Human Resources expatriate policy.

### **General**

#### **When Male and Female Employees Travel to the Same Event**

Work responsibilities occasionally require female and male employees or volunteers to travel to the same event. While separate transportation may be requested by employees in order to avoid the appearance of impropriety, individual Church departments and employees should not develop travel policies or practices that discriminate against employees based on gender. This includes practices that would curtail work, promotion, or travel opportunities. Travel practices should not be applied in a way that would limit the ability of employees to accomplish their job responsibilities, to attend business meetings or conferences, or to pursue development opportunities.

Employees should nonetheless use wisdom and prudence while traveling to avoid inappropriate conduct and the appearance of impropriety.

### **Church-Issued Corporate Credit Card**

Church issued credit cards are available at no cost for all travelers on the Church's business according to the following guidelines:

- Travelers who expect to incur travel expenses use a Church-designated corporate credit card whenever possible;
- Church-designated corporate credit cards are to be used only for business travel expenditures. Personal use of Church-designated corporate credit cards, including cash withdrawal, is not allowed;
- Travelers are responsible for timely payment of all charges to the issuing bank;
- Delinquent cards are subject to cancellation by the Church or the card issuer;
- The cardholder is responsible for delinquent fees and should not submit these charges for reimbursement;
- Cancellation of the Church-designated corporate credit card could impede a traveler's ability to perform essential work tasks and might result in work-related discipline or assignment changes; and
- Cards are returned to the Church when the traveler's duties are terminated or when the designated Church travel office so directs.

### **Key Employee Group Travel**

When making travel plans, travelers should consider the impact on the Church if an accident were to occur. Therefore, whenever a group of key personnel (such as managing directors and key department or division personnel who perform unique or essential functions) are required to travel to the same destination, it is recommended that they do not all travel together in the same aircraft or vehicle.

### **Non-Church Employees**

Non-Church employees, such as contractors and job candidates who travel at Church expense, are expected to abide by the policy guidelines set forth in this

document. Travel arrangements (air, lodging, ground transportation, passport and visa needs) should be made through the Church Travel Office by a department travel coordinator using the self-booking tool or by calling a Church travel counselor at 1-800-537-1232 (ext. 2-3334).

### **Travel Approval**

Advance approval for travel is obtained from the traveler's supervisor or manager. The same supervisor or manager and the department controller should approve the traveler's expense reports.

- Supervisors should approve travel requests only when the trip is necessary to conduct the business or meet the training needs of the traveler.
- Before approving travel, the supervisor should be sure there is money available in the designated budget to cover the cost of the trip.
- Supervisors should generally not approve a trip until the traveler's previous expense reports have been completed and submitted.

### **Traveler Profiles**

Travelers should create and maintain a complete traveler profile in the Church-sponsored self-booking tool (where available) or with a Church Travel Agent to ensure that key individual data and preferences are used during the reservation process.

- The name used in the traveler profile is to match the name on the traveler's passport or national ID.

### **Travel Reservations**

All air, lodging and car rental reservations are reserved through the Church-sponsored self-booking tool or the designated Church travel office. These are charged to the corporate travel card. The designated Church travel office is responsible for:

- Reserving air, hotel and ground transportation.
- Helping to locate travelers in case of emergency.
- Applying Church-negotiated discounts to the services used.
- Providing consolidated reports for travel management.

- Monitoring and enhancing preferred supplier programs.
- Managing travel agency performance and relationships in areas where the bookings are outsourced.

Please note: The Church requires pre-trip authorization for all Church-related business travel.

- All airfare must be charged to the Church's corporate travel account or a Church-designated corporate credit card.
- Non-airfare travel related expenses, including hotel, car and meals, are charged to the traveler's individual Church travel card.
- Travelers may use personal upgrades to improve class of service (such as airline, hotel room and car rental class upgrades), provided there is no additional cost to the Church. Travelers must request and manage any upgrades on their own.

### **Vendor Travel**

Travelers do not travel at the expense of any vendor, travel in the private aircraft of any vendor, or accept or use travel arrangements completed by any vendor.

This does not include training trips specifically covered in the price of purchased or contracted equipment.

### **Air Transportation**

Travelers must book air transportation through the Church-sponsored self-booking tool or the designated Church travel office.

Travelers should travel on contracted carriers unless service is not available to a particular destination, the service offered presents an unreasonable routing between origin and destination, or an alternate non-travel option is available.

### **Advance Purchase and Ticket Restrictions**

Airfare should be purchased at least 14–21 days in advance because the differences in fare can be substantial. Make sure to account for approval time when booking your flight.

- Restricted tickets – such as nonrefundable, advance purchase and discount tickets – are generally less expensive and should be used whenever possible.

### **Airline Class of Service**

All air travel is restricted to coach fares. Business class is allowed in the following circumstances:

- A traveler is flying within Africa (for safety purposes).
- A traveler is accompanying a General Authority that is traveling in business class.

### **Bumped Tickets**

If a traveler is given an airline voucher as compensation for being bumped from his or her scheduled flight, that traveler may use the voucher for personal travel.

### **Electronic Tickets**

Electronic tickets will be issued whenever possible. These tickets eliminate the need to file lost ticket applications, pay higher fares for replacement tickets, or pay fees for prepaid tickets.

- It is advisable to have the most current itinerary on hand in order to avoid confusion over multiple bookings or changes to other itineraries. Some airports may also require an itinerary and a government-issued photo ID to use curbside check-in services or to pass security checkpoints in the airport.
- If travel plans change, notify the designated Church travel office immediately, before flight time. All the rules of ticket cancellation and exchange still apply.
- To refund any unused ticket, either whole or partial, please contact the designated Church travel office immediately.

### **Frequent Flyer Program**

Use of frequent flyer or reward program benefits should not influence the traveler's decisions when arranging travel for Church business.

- Travelers may retain all frequent flyer or reward program benefits derived from traveling on behalf of the Church.

- Membership fees associated with joining these programs are not reimbursable.

### **Lost Baggage**

The airline is ultimately responsible for retrieving and compensating for lost baggage. The Church-designated corporate credit card provides \$1,250 secondary limited baggage insurance.

- The traveler should first attempt to get compensation from the airline.
- If additional reimbursement is required to cover the value of the lost items, the traveler may obtain a lost luggage form from the designated Church travel office and submit it to the corporate card company.

### **Lowest Logical Airfare**

Travelers are encouraged to purchase airfare at or near the lowest logical airfare. The following criteria will be used by the designated Church travel office to determine the lowest logical airfare:

- Church-negotiated fares
- Nonrefundable fares
- Restricted discounted fares
- Penalty fares
- Advance purchase fares
- Connecting and one-stop flights
- Off-peak flights
- Alternate airports
- Promotional or bulk fares
- Lower-cost non-preferred carriers

### **Payment of Airfare**

Travelers must charge all airfare to the Church's corporate travel account or a Church-designated corporate credit card.

### **Ticket or Itinerary Changes and Fees**

To avoid costly airline fees (\$150 and higher), travelers are encouraged to avoid changing their travel

itinerary after a ticket has been issued.

Travelers are expected to plan their trips wisely to avoid and minimize itinerary changes.

### **Travel on Private Aircraft**

The managing director of a department may authorize a traveler to use air transportation other than scheduled airlines or charter flights. These companies should possess certification from the Department of Transportation or a comparable governmental agency.

- Written approval is obtained from managing director prior to departure.
- The written approval should be limited to specific flights for specific travelers or be limited to a specified type or purpose of transportation for an identified group of travelers.

Such flights should be necessary to successfully conduct official business and should not be solely for traveler convenience. Only authorized travelers are to accompany the traveler.

### **Unused Tickets, Cancellations and Refunds**

Unused airline tickets have significant value and should be treated as cash. Unused tickets are reported to the designated Church travel office as follows:

- For unused electronic tickets, contact the designated Church travel office immediately, before the scheduled flight departure time, to ensure credits or refunds are issued.
- For unused paper tickets, return the tickets to the designated Church travel office as soon as it is determined that the tickets will not be used.
- Returning unused paper tickets to the designated Church travel office does not automatically cancel travel reservations. Travelers call the designated Church travel office before the flight's scheduled departure time to cancel their reservations; otherwise the ticket becomes invalid.

### **Upgrades**

Travelers may upgrade their class of travel only when there is no additional cost to the Church. Travelers must request and manage any upgrades themselves.

## Ground Transportation

Church travelers must book car rentals through the Church-sponsored self-booking tool or a Church corporate travel agent. The Church has negotiated preferred supplier programs to meet its car rental requirements. Travelers must use the preferred companies unless their services are not available, a vehicle is not available, or locally negotiated arrangements are more beneficial.

Church travelers must be licensed and 21 years of age or older to rent a car.

**Note:** Driving in countries outside the traveler's country of origin may require an international driver's license.

### Church Motor Pool

For local or regional business travel, a vehicle from the motor pool may be a suitable alternative to flying, renting a vehicle, or driving a personal vehicle. Please refer to the vehicle use policy.

### Class of Service

Midsize cars are the standard for all Church travelers. Specialty vehicles can be used when needed.

The type of rented car should reflect the appropriate image of the Church.

### Inspection and Refueling

When you select a vehicle, inspect it for any damages before leaving the car rental lot.

Return rental cars with a full tank of fuel to avoid refueling surcharges imposed by the rental companies. Fuel receipts should be submitted with the expense report.

### Insurance

For U.S. rentals: The Church has contracts with preferred suppliers that include full liability and collision insurance.

Drivers should not accept any additional insurance coverage for U.S. car rentals when using the Church's preferred suppliers and contracts.

If a preferred supplier is not available, the traveler should accept the liability and collision insurance offered by the car agency.

For international rentals (including Canada and Mexico): The Risk Management Department requires travelers to purchase liability (LDW) and collision/comprehensive (CDW) coverage. If there is an accident and the traveler does not have this additional coverage, the traveler could be detained before leaving the country.

### One-Way Rentals

If a traveler's plans dictate a one-way rental (a drop-off at a location other than where the automobile was rented), the traveler should advise the travel agent (for agent-assisted bookings) or place a comment in the appropriate block (for online bookings) when booking.

The agent will review options to secure the best possible rate. Be aware that drop-off and mileage charges can be high, depending on the distance from the renting location and the cities involved.

### Payment of Car Rentals

All car rentals must be charged to a Church-designated corporate credit card.

### Personal Car

Travelers should select the most economical means of travel. Personal vehicles may be used for business trips as long as the reimbursed mileage expense would not exceed the airline ticket and car rental expense. If travelers choose to drive a personal car instead of flying when flying would have been more economical, they will be reimbursed for the cost of airfare or mileage plus meals and lodging, whichever is lower.

Travelers must have sufficient automobile liability and property damage coverage. The Church will not pay for damage, mechanical repair, service, or insurance of personally owned vehicles used for Church business.

Travelers will be reimbursed on a per-mile rate that is published each year by the Vehicle Review Committee. If a traveler chooses to have another individual drive him or her to or from the airport in lieu of parking, the mileage both ways may be reimbursed.

Airport parking expenditures are reimbursable. Travelers should select the most cost-effective parking options. In locations where there are no specific preferred agreements, a taxi or car service may be more convenient and less expensive for longer trips.

### **Taxis and Public Transportation**

Travelers should use the most economical and safest mode of transportation. Travelers should consider using local transportation, such as hotel shuttles, taxis, or public transportation between airports, home and the departure point, or between the arrival point and place of meeting or lodging. Such expenditures are properly identified on the expense report.

### **Lodging**

Church travelers must book their lodging through the Church-sponsored self-booking tool or through the designated Church travel office.

The Church has negotiated rates at specific hotel chains and properties in many major travel destinations. Travelers are encouraged to use these properties whenever possible so that the Church can leverage its purchasing power and meet room night commitments. The Church-negotiated rates can be accessed through Church Travel Services, area travel services, or the Church-sponsored self-booking tool.

If a traveler books lodging for an international trip directly through the area office to take advantage of local contract rates, he or she should contact the designated Church travel office to inform them of the traveler's whereabouts in case of emergency and to ensure accurate reporting of the Church's travel patterns and expenses.

### **Cancellations and Changes**

Hotel reservations made by Church Travel Services are guaranteed for late arrival unless otherwise specified, such as when the traveler's corporate or department credit card is required to confirm and guarantee the hotel reservation.

If the traveler needs to cancel a reservation, it is his or her responsibility to contact a Church travel agent or to contact the hotel directly to cancel the reservation in order to avoid a no-show fee. A cancellation number

will be provided, relieving the Church and the traveler of any obligation for payment. It is advisable to note the cancellation number in case a dispute occurs. Contact information is on the itinerary. Travelers should refer to their itinerary for the hotel cancellation policy. It is the traveler's responsibility to be aware of advance notice requirements for cancellations or changes. Failure to cancel a hotel reservation in a timely manner may result in non-reimbursement of the expense.

If the traveler changes lodging plans, he or she should contact the designated Church travel office to inform them of the traveler's whereabouts in case of emergency and to ensure accurate reporting of the Church's travel patterns and expenses.

Because pre-booking is not always possible for driving trips, these trips may be exempt from the lodging policy.

### **Conferences and Conventions**

Because conference and convention sponsors often negotiate special rates with hotels, the traveler should book a room directly with the hotel if Church Travel Services cannot secure the same rate.

If the traveler books lodging directly with the convention property, he or she should contact the designated Church travel office to inform them of the traveler's whereabouts in case of emergency and to ensure accurate reporting of the Church's travel patterns and expenses. This will also allow the Church travel office to give the traveler a complete itinerary.

If the convention is not at a preferred property and a lower rate is available nearby, the traveler should consider staying at the Church's preferred property.

### **Lowest Logical Rate**

Travelers are encouraged to book hotel rooms at or near the lowest logical nightly rate available. Church Travel Services will use the following criteria to determine the lowest logical nightly rate:

- Church-negotiated rates
- Restricted discount rates
- Promotional or bulk rates



- Lower-cost safe and acceptable non-preferred hotels

When determining the lowest logical rate, the traveler should consider additional benefits, such as free breakfast, distance to the event, parking and Internet access.

### **Payment of Charges**

All hotel expenses should be charged to a Church-designated corporate credit card.

### **Reward Programs**

Use of hotel reward program benefits must not influence the traveler's decision when arranging travel for Church business. Reward program membership fees may not be reimbursed. Hotel rewards may be retained for personal use.

### **Telephone and Internet Charges**

Telephone calls for business purposes are authorized and will be reimbursed upon completion and approval of a trip expense report.

To avoid substantial surcharges added by hotels, telephone calls should not be charged to the traveler's hotel room. Instead, travelers should consider using calling cards or calling from local Church offices to minimize unnecessary phone expenses.

Travelers may want to investigate communication packages offered by hotels that could include local, long distance and Internet charges.

Travelers should be aware of their international and roaming rates when using a cellular phone.

When possible, reasonable personal calls should be defined by your supervisor or manager before your trip.

### **Tipping**

Gratuities should be limited to the reasonable norm within the country and should be included in the amount shown for the applicable expense. It is reasonable to report gratuities to skycaps, hotel porters, maids and bellhops as "tips." These will then be reimbursed to the traveler as part of the expense report process.

## **Miscellaneous**

## **Business Meals and Activities for NonChurch Employees**

It may occasionally be necessary to host business contacts outside of Church offices. Such meals and activities should not be lavish and should be necessary to conduct business. Receipts are required and the host should record the following information on the receipt:

- Date
- Department and project
- Name of guest
- Name of guest's company
- Type of expense, such as dinner or lunch
- Establishment name
- Establishment city
- Business purpose

### **Combined Business and Personal Travel**

When a traveler chooses to combine business and personal travel, the Church will not pay for lodging, meals, or other costs incurred during any additional personal time.

### **Daily Meal Allowance**

Meal expenses directly related to travel will be reimbursed. The Church does not have a set daily meal limit. Travelers should dine at reasonably priced establishments and exercise reasonable judgment in the selection process.

### **Emergencies While Traveling**

The Church contracts with a worldwide travel service to handle emergencies for those traveling on Church business. This service provides medical attention, access to multilingual doctors and evacuation assistance. The director for temporal affairs works with travel personnel in the Materials Management Department to make sure those who are traveling have access to this service.

### **Expense Reporting**

Expense reports are to be submitted within one week of returning from a trip. Frequent travelers and travelers

working away from Salt Lake City or the area administration office may receive special permission from Church Travel Services or the area administration office to submit their reports monthly. Church Travel Services or the area administration office will reimburse travelers for authorized travel expenses as soon as possible after receiving the expense report.

### **Immunizations**

Immunizations may be required when traveling abroad. Travelers working in the Salt Lake City area should visit the health unit in the Church Office Building for assistance with immunizations. Non-Church employees should contact their local health provider for assistance. Spouses and travelers outside the Salt Lake area but living in the U.S. should contact their county health office for assistance. Travelers working outside the U.S. should contact their local health provider for assistance.

### **Miscellaneous Reimbursable Expenses**

Receipts are required for all miscellaneous reimbursable expenses. If you are unsure that an expense is reimbursable, please speak with your supervisor or manager **before incurring** the expense. The following expenses will be accepted for reimbursement when they are directly related to Church business:

- Business telephone calls and limited personal calls
- Tips (consistent with local customs)
- Parking, tolls and airport fees
- Currency conversion and traveler's checks
- ATM and credit card fees for cash advances
- Laundry expenses for trips lasting longer than six days
- Passport and visa (These need to be obtained through the designated Church travel office.)
- Required immunization costs
- Excess baggage charges when required for business purposes

### **Non-reimbursable Expenses**

Expenses that are not considered business expenses and are not reimbursable include the following:

- No-show fees for hotel rooms or car services that were not properly cancelled
- Traffic fines, court costs, attorney's fees, parking tickets, or moving violations
- Frequent flyer and hotel loyalty program costs
- Air travel insurance and personal trip insurance
- Personal reading materials, such as books and magazines
- Health spa or gym memberships
- In-flight or in-room movie rentals or local entertainment
- Luggage and briefcases
- Baggage insurance
- Pet or home sitting
- Shoe shine
- Souvenirs and personal gifts
- Babysitter fees
- Credit card membership fees
- Haircuts
- Lodging costs while staying with a friend or relative
- Calls from airplanes using in-seat phones (except for emergencies)

### **Passports and Visas**

Passports are required for all international travel. Travelers are responsible for obtaining the necessary passports and visas. U.S. citizens living in the United States should use Church Travel Services to submit passport applications. Citizens of other countries should contact their local government agency to obtain passports. The time required to obtain these documents varies by country and may be a few days or several months. Travelers need to allow sufficient processing time for any needed passports and visas.

## **Preferred Vendors**

For the most current list of preferred travel providers, visit the Church-sponsored self-booking tool or talk to the designated Church travel office.

## **Receipts**

Original receipts are required for all reimbursable expenses in excess of \$25, or local specified amounts, where receipts are normally given. These receipts are included with the traveler's expense report.

## **Travel Insurance**

The Church will **not** reimburse the traveler for any personal insurance premiums. All travelers are covered by corporate travel insurance as long as the airfare was charged to a Church-designated corporate credit card or the Church travel account (CTA). This insurance includes the following benefits:

- \$500,000 common carrier accidental death and dismemberment
- \$1,250 lost or stolen baggage
- Car rental insurance
- Hotel theft insurance
- 24-hour roadside assistance through AAA motor clubs
- Travel, medical and legal assistance

Please note: Travelers are responsible for the safekeeping of personal property (such as clothing, jewelry, money and cameras). The Church assumes no liability for these items.

## **Traveling with Family**

The Church recognizes that travelers may occasionally choose to have family members accompany them on trips for which the primary purpose is Church business. Travelers should receive approval from their manager prior to making family travel arrangements. The traveler should keep track of all expenses on an individual basis and only submit for reimbursement those expenses pertaining specifically to his or her portion of the trip or activity.

When dining, the traveler should calculate his or her share of the meal, note it accordingly on the receipt and submit only that amount for reimbursement. If the trip extends beyond the time that would otherwise be required, the traveler should not submit any additional hotel, food, or car rental expenses for reimbursement.

Travelers must coordinate their portion of all air, lodging and car rental reservations through the Church-sponsored self-booking tool or the designated Church travel office.

# Perpetual Education Fund

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## Executive Summary

### Purposes, Principles, Promises

Patterned after the Perpetual *Emigration* Fund, the Church established the Perpetual *Education* Fund. The following summarizes the purposes of this new “PEF,” aimed to help returned missionaries and other young adults in developing areas:

*“With greatly improved opportunities, they will step out of the cycle of poverty which they and those before them have known for so long. They will become leaders in this great work in their native lands. They will pay their tithes and offerings, which will make it possible for the Church to expand its work across the world”* (Gordon B. Hinckley, *Ensign*, November, 2001, p. 53).

The following statements form the basis for the PEF initiative. See further details in PEF Training on the PEF Website.

### Hope, Opportunity, and Local Employment

“Education is the key to opportunity [and] with good employment skills, these young men and women can rise out of the poverty they and generations before them have known. Most of these students will attend technical schools...in the areas where they live...where they will learn skills which are in demand and for which they can become qualified” (Gordon B. Hinckley, *Ensign*, date, p. \_).

### Integrity and Self-reliance

“The beneficiaries will repay the money. And when they do so, they will experience a wonderful sense of freedom because they have improved their lives not through a grant or gift, but through borrowing and repaying. They can hold their heads high in a spirit of independence” (Gordon B. Hinckley, *Ensign*, date, p.\_).

### Stronger Families and Communities

“They will marry and go forward with skills that will qualify them to earn well and take their places in society where they can make a substantial contribution” (Gordon B. Hinckley, *Ensign*, date, p. \_).

### Church Leadership and Growth

“They will serve in the Church and grow in leadership and responsibility.... As faithful members of the Church, they will pay their tithes and offerings, and the Church will be much the stronger for their presence in the areas where they live” (Gordon B. Hinckley, *Ensign*, date, p. \_).

### Commitment and Cooperation

“The program is priesthood-based, and that is why it will succeed. It begins with the bishops and the stake presidents. It involves the Church Educational System, the Employment Services offices, and others who work together in a marvelous spirit of cooperation. We have the organization...and dedicated servants of the Lord to make it succeed” (Gordon B. Hinckley, *Ensign*, date, p. \_).

### Sacrifice, Agency, Unity

“We have resting upon us a very serious obligation.... Let us open our hearts, let us reach down and lift up, let us open our purses, let us show a greater love for our fellowmen.... The way before us is clear, the need is tremendous, and the Lord has pointed the way” (Gordon B. Hinckley, *Ensign*, date, p. \_). ***The following scriptures further teach PEF principles.***

Sacrifice, caring, unity: Heb. 12:12; D&C 38:25-27; 42:38-39; Moses 7:18

Work, diligence, self-reliance: Gen. 3:19; Matt. 25:14-30; D&C 78:14; 104:15-17

Learning: Alma 1:26-27; D&C 88:78-80; 130:18-19

**Helping the poor: Deut. 15:7-8; Mosiah 4:19, 26; D&C 56:16, 17**

## Organization, Roles, and Responsibilities - Headquarters

### Board of Directors

The Board of Directors includes Church officers appointed by the First Presidency. The Chairman is the

President of the Church or his appointee. The Board provides oversight and policy direction.

### **Perpetual Education Fund Department**

The Board appoints an executive director to lead the PEF Department and oversee worldwide operations. The executive director coordinates activities of PEF with priesthood leaders and other Church entities to achieve PEF purposes. Cooperation with other departments and Area PEF Committees is essential.

With approval of the Board, the executive director appoints other volunteers and paid staff. These may include a managing director, directors of finance, operations, and training/communications, as well as a controller.

### **Headquarters Committees**

**Executive Committee** The PEF executive director serves as chairman. Members include PEF directors plus representatives of the Church Educational System, Welfare Services, Employment Resource Services, and Finance. They develop overall strategy, policies, and procedures under direction of the Board.

**Loan Committee** The PEF managing director serves as chairman. Members include appointees approved by the executive director.

**Audit Committee** The commissioner of Church education chairs the audit committee which also includes the PEF executive director.

**PEF Department Controls Committee** The PEF managing director serves as chairman. Members include the PEF finance director and others as appointed.

The PEF executive director may approve other committees as necessary.

## **Organization, Roles, and Responsibilities - Areas**

### **Area PEF Committee**

Each Church area approved for the Perpetual Education Fund program establishes an Area PEF Committee. Merging the strength of leaders in the

existing Church organization, this group creates and implements the Area PEF Annual Plan. Details and video descriptions of effective committee operations are provided in the PEF Training which is accessed from the PEF Website.

The chairman, **a member of the area presidency**, directs the committee. He represents all priesthood leaders in the area and trains and encourages these leaders in PEF principles, duties, and accountability. He reports PEF progress to his leaders at headquarters.

The vice-chairman is appointed by the Area Presidency and is often the **Seminaries and Institutes (S&I) area director** who represents S&I leaders, teachers, staff, and volunteers in the area. He trains and leads these people to accomplish their critical PEF duties, including teaching and assisting PEF participants.

The **director for temporal affairs (DTA)** participates and directs the **area welfare manager (AWM)** and **employment resource services (ERS) managers** to provide information, training, and guidance to PEF participants.

The **Area PEF Coordinator** serves as executive secretary to the committee, and ensures that the Area PEF Annual Plan is achieved. He or she facilitates and coordinates all activities and efforts of committee members, evaluates progress and challenges, follows up on actions needed, and coordinates with PEF headquarters. S&I, ERS, and PEF **missionaries or other volunteers** may also be asked to serve.

This committee meets regularly to review the Area PEF Annual Plan and reports and gives leadership to PEF activities in the Area.

Detailed instruction and video descriptions related to these and other Area roles are provided in the PEF Training which is accessed through the PEF Website.

### **Local Leadership**

Under the direction of the Area PEF Committee, local priesthood leaders in stakes and wards, stake specialists (often stake employment specialists), S&I institute directors, coordinators, teachers and volunteers, ERS managers, and various volunteers all work together to prepare and sustain young adults who seek better training and work. They coordinate to track PEF

participants and other young members, to mentor them, and to help them overcome challenges.

Detailed role descriptions and video demonstrations are provided for the following roles in the PEF Training which is accessed from the PEF Website:

Stake Presidencies & Bishoprics

Stake Specialists

Seminaries & Institutes

Employment Resource Services

PEF Service Center Staff & Volunteers

### **PEF System**

The Area PEF Committee and local counterparts use the online PEF System to help PEF applicants and participants.

Detailed processes, roles, and tasks are provided in the Processes and Tools sections.

## **Participant Success and Accountability**

### **Participant Success: Overall Process**

The key processes followed by all involved to help PEF participants succeed are provided in the Process section. Accountability for participant success is shared by participants, leaders, and all who assist.

### **Participant Success: Key Indicators**

The progress of PEF participants toward achievement of the “prophetic promises” listed above is measured, in part, by PEF “Key Indicators.” Leaders are accountable to help prepare young people to participate successfully in PEF, and sustain them as they achieve these key indicators:

**Graduation** For those scheduled to graduate, the percentage of participants who complete their schooling.

**Employment** For those who have graduated or withdrawn, the percentage of participants who report current employment.

**Better Work** For those who are working, “better work”

is determined by the participant after answering key questions, beginning six months after school completion or withdrawal.

**Cumulative Loan Repayment** For all participants, the percentage of payments received compared to payments due.

**Loan Repayment Most Recent 12 Months** For participants who began school for the first time with a PEF loan in the most recent 12 months, the percentage who are current in payments.

**Total participants current in payments or making payments** For all participants, the percentage who are current in payments or who made a payment in the current month.

**Participants contacted in current month** (calls, emails, text messages) For all participants, the percentage who were contacted in the current month.

Area PEF Committees make goals for each of the key indicators in their PEF Annual Plan and implement key processes and tasks to achieve them (see Processes and Tools sections).

To help participants accomplish the objectives reflected by the key indicators, all involved in PEF work to prepare and sustain participants.

### **Participant Success: Preparation**

Participants have a much greater chance to succeed if they are prepared to meet the challenges involved and make the sacrifices required to gain additional education and better work to keep their commitments.

Basic requirements are as follows. Exceptions, if necessary, may be requested by a member of the Area Presidency through the Area PEF Coordinator.

Ambitious, worthy, and in need; show integrity to keep PEF commitments; endorsed by priesthood leaders

Appropriate age, 18-30

Returned missionary (if a single brother age 19-26)

Enrolled in the local Institute of Religion and meeting attendance requirements, if single and age 18-30

Live, attend school, and seek work locally

Committed to pay as much of the education cost as possible from personal and family resources (minimum requirements may be established by each area)

If a renewal applicant, current with monthly PEF loan payments and other requirements; maintain satisfactory progress toward graduation

PEF participants also need to prepare a sound plan. They should choose a promising *career*, select an effective, local *school* to help qualify them for that career, and organize their *finances* to pay for the training. Applicants create this plan by completing the **PEF Planning for Success Course** (see Process section) at the local institute *before* they submit an application. For renewal applications, this course is not required. However, before participants graduate, they are strongly encouraged to complete the **Career Workshop** at the local Employment Resource Center.

### Participant Success: Sustaining

Under the direction of area and local priesthood leaders, PEF participants are sustained in their efforts and contacted regularly, preferably monthly. This process is tracked and reported through the PEF System. It is described in the Process section.

## Additional Key Information and Policies (alphabetical order)

### Age Exceptions

By direction of the Board, PEF applicants are generally ages 18 through 30.

Applicants under age 18 or over age 30 may be considered if a request for age exception is submitted for each individual by a member of the area presidency, through the area PEF coordinator. Exception requests should describe:

What makes this applicant unique from others?

If under 18, why should the applicant be considered, given the maturity and commitments required?

If over 30, why didn't the person study at a younger age?

Has the applicant demonstrated his or her willingness

to first use personal, family, and local resources?

Age exception requests are not generally required for renewal applications. However, if the renewal applicant is over 30 and has had a gap in schooling longer than 12 months, an exception request is required.

### Direction and Changes

The PEF Board of Directors, including the PEF Department executive director, leads PEF efforts worldwide. As necessary, they review, refine, approve and/or add policies and procedures and make needed changes.

Monthly, the PEF executive director provides each area with reports on progress with key indicators and other important information. Periodically, other information is delivered to all involved to refine and improve PEF activity.

### Educational Program, Preparation, and Completion

#### Type of Education Funded

PEF loans are provided primarily for technical and vocational training *that leads to gainful work* in the local community and will enable participants to achieve self-reliance. Even in areas that face severe economic challenges, careful research often exposes potential work opportunities, sometimes in specialized niches. These usually require specific training, often one to two years in length. Some "professional" training that meets this criterion will be considered.

Loans may be provided to assist participants in completing high school level education if such education is part of a broader plan that includes training leading to better work.

#### Length of Educational Program and Contribution to Educational Costs

To encourage applicants and their families to seek the type of work opportunities described above, to spread PEF funds as widely as possible, and to encourage shorter educational programs, some areas require participants to pay a portion of their education costs, especially for longer programs. No programs over 6 years are funded.

## **The Planning for Success Course**

To help young adults design a successful plan for their education and work opportunities, all PEF applicants should complete the PEF *Planning for Success* course at the institute *before* they submit an application.

## **Application Completion and Timing for Initial and Renewal Applications**

Participants must submit a new application and receive approval for each year of education for which a PEF loan is requested. Applicants complete the application online on the PEF website.

ERS reviews applications to ensure the applicant's career, education, and finance plans, including the expected income, are reasonable for the local economy.

Applications are accepted only if the school start date is (1) after the date the application is submitted to PEF headquarters, but (2) not more than six months before that date.

Applicants whose plans are not approved are encouraged to adjust and resubmit their application.

## **Commitments, Legal Documents, and Initial Call to the PEF Service Center**

Once an application is approved, local leaders are notified via the PEF System. They then arrange to inform the new PEF participant and conduct a loan interview. Instructions and forms for this interview are provided on the PEF System.

### **Loan Approval**

A description of the loan approval process is provided in the Process section.

### **Satisfactory Progress and Sustaining Process**

Participants should make consistent progress toward achievement of their plan and goals. If it is a multi-year program, satisfactory progress should be demonstrated and verified by the S&I director or an appointee during the loan interview, prior to renewal of the loan.

When participants encounter challenges or emergencies, they should contact their families, local priesthood and S&I leaders, or the PEF Service Center.

All work to sustain participants and help them resolve problems. Employment Resource Services can help to find a new or better job. Priesthood leaders can provide spiritual and temporal assistance, if required. If necessary, changes in loan terms can be approved by the PEF Service Center after reviewing the participant's individual situation. All offer encouragement and inspiration.

## **Graduation or Withdrawal**

Participants should contact the appropriate PEF Service Center when they graduate or withdraw from their educational program. Service Center staff and volunteers provide important instructions, gather key information, and offer encouragement. This information is entered into the PEF System. Priesthood and S&I leaders are notified. ERS receives notice that assistance may be needed to acquire a new job. Finance is notified to prepare repayment coupons at the higher monthly payment.

## **Funding and Finances**

### **Financial Policy and Instruction**

Documentation of financial policy with procedures has been prepared regarding PEF finances. Please see the Tools section. Those involved in any aspect of PEF finances should read this document carefully and refer to it often.

### **Collection and Use of Funds**

As approved by the Board, the Presiding Bishopric establishes guidelines to facilitate contributions to PEF through normal donation procedures in local units. A line on the Donations Form is provided for "Perpetual Education." LDS Philanthropies, together with the PEF executive director and staff, may assist in arranging more complex contributions. PEF contributions are managed by the Presiding Bishopric, Ensign Peak Investment, and others as directed. Regular financial reports are provided to the executive director and the Board.

### **Oversight of PEF Corpus**

Ensign Peak Investment directly oversees the investment of the PEF corpus according to Church policy and procedure.



## **PEF Loan Budget**

The budget to fund new loans and related expenses is established and approved annually and reviewed regularly with the Board.

### **Administrative Budget and Accountability**

PEF presents an annual administrative budget request through normal channels. Accountability lies with the executive director and the PEF executive committee.

### **PEF Finance Activity in Areas**

Assisted and trained by Regional Controllers, the director for temporal affairs (DTA) in each area and the controller who reports to him or her are responsible for PEF finances in the area. Their PEF-related duties are summarized in the Processes and Tools sections.

### **Information Security and Privacy**

Information gathered on participants' applications and all aspects of participation in the PEF effort is kept appropriately confidential. Such information may be shared with priesthood leaders and others as approved by the PEF managing director, following guidance from the legal department of the Church. As part of the application process, participants agree that their payment history may be reported to local credit reporting agencies in case of flagrant malfeasance.

## **Operations**

The PEF director of operations reports to the PEF managing director and leads operations volunteers and staff to guide PEF activity worldwide through effective processes that lead to improvement in key indicators. See Process and Tools sections.

## **Participating Areas and Countries**

### **Board Approval of Eligible Areas**

Based on proposals from the PEF executive director, the Board of Directors determines which Church areas and countries will be eligible for the PEF program. Once approved, actual inauguration of the PEF program in an area or country is conditioned on availability of PEF funds and satisfactory completion of a PEF Executive Summary.

## **PEF Executive Summary**

Prior to inauguration of PEF in any Church area or country, the Area PEF Committee completes a satisfactory PEF Executive Summary for that region. This requires, at a minimum, demonstration of the following:

Adequate strength and commitment among area and local priesthood leaders

A functioning Area PEF Committee (and potentially Country PEF Committees)

Demonstrated need given numbers of returned missionaries and similar young adults

Demonstrated potential for adequate schools and employment opportunities

A legal lender of record

An established, simple loan repayment system

Adequate strength and commitment of S&I personnel and organization

Adequate strength and commitment of ERS personnel and organization

Adequate strength and commitment of finance personnel

Resources in the region to support participants' efforts to work, learn, graduate

An effective system and staff/volunteers to sustain participants

Headquarters departments (S&I, ERS, and Finance) also need to approve the Executive summary for their respective areas. Please also see the Tools section.

## **Perpetual Education Fund, Inc.**

Perpetual Education Fund, Incorporated, a Utah corporation, has been established to provide a legal entity needed for some Church areas and as a preferred beneficiary for some donors.

## **PEF Loans**

### **Loan Amounts**

Loan amounts are determined by the educational

funding needs of the participants but may not exceed the total cost of tuition, books, and fees. The formula for calculating educational funding needs is contained in the application.

Area PEF Committees may establish maximum annual and cumulative loan amounts for their area and countries.

A loan application cannot be submitted if the potential debt burden may be too high; that is, when the participant's anticipated monthly loan payment, including the interest factor set by the Church, will be greater than 10% of the participant's monthly estimated gross income within one year of completing their funded education.

Area PEF Committees may submit other unique policies regarding loan amounts for consideration. The PEF Department will make a final determination and inform the Area PEF Committee appropriately.

The Loan Committee may make specific adjustments to loan amounts approved versus those requested.

### **Living Costs**

Funds from PEF loans are not used for living costs, including rent, utilities, food, and so forth. As an exception, some areas, with PEF headquarters approval, have authorized PEF funds to be used for specific transportation costs.

### **Interest**

The annual interest rate is 3% or legal inflation, whichever is higher. An inflation factor set by the Church will be established annually by November 1 for the following year and combined with the interest rate.

Interest will not accrue until the after-school repayments first become due, which is 180 days after the first day of the month following school completion or withdrawal.

### **Loan Repayment**

PEF participants are committed to repay their loans as a matter of integrity, as a demonstration of self-reliance, and to help others receive the same opportunity.

Ninety days after the first day of the month following

the start of school, participants begin to make small monthly payments as established by the Area PEF Committee and calculated in local currency).

These small payments assist participants to develop appropriate payment habits, accept responsibility for their education, and encourage them to work, if possible, thus developing good work habits that will assist them in securing future employment. These payments are applied to the loan principal.

Six months after the first day of the month following graduation or withdrawal from school, participants stop the in-school payments and begin a schedule of monthly payments including interest, typically amortized for eight years.

Participants are encouraged to repay their loan as soon as possible. Participants are provided with loan payment coupons or a schedule of "direct debits" from their bank account, indicating how much is due monthly and where, when, and how to submit all loan payments.

### **Loan Disbursement**

Upon loan approval and receipt of required documents from the participant, and after the participant has made an initial call to the PEF Service Center, disbursements for tuition are made, payable directly to the school. Some allowances may be made to purchase books and supplies when such supplies are not available at the school. These allowances may be reimbursed directly to participants. Receipts are required.

Disbursements are typically made according to the disbursement schedule provided with the participant's application and are generally made at least twice but no more than four times per year.

### **Changes to Loan Terms and Status**

Participants may sometimes face challenges or events that require a change in loan terms. In such a situation, participants should first review their current loan terms by accessing their individual Participant Progress Report online at [www.lds.org/pef](http://www.lds.org/pef).

With this information, the participant should then contact their PEF Service Center to discuss the situation, review alternatives, and possibly request a change. The

contact information is available online as part of the Participant Progress Report. Only the Area PEF Coordinator, the PEF Service Center staff, the local area PBO finance staff, or PEF headquarters staff may approve and implement a change in loan terms. Changes will be in accordance with the PEF Loan Action Policy (see the Tools section).

If a request for change in loan terms is granted, the result will be indicated in the individual's Participant Progress Report online.

Changes to participant or program status should also be reported to the PEF Service Center, including personal or family status, name or address, school contact information, program of study, school, or graduation date.

### **Refund Policy**

Participants and schools are required to refund directly to PEF or its designated representative the amount of any loan or portion of a loan that is unused due to withdrawal from school or other reason. The required refund is calculated by using the percentage of education completed multiplied by the loan amount. The PEF refund policy may be adjusted according to the refund policy of the school. Refunds are due within 60 days of withdrawing from school.

### **School Validation**

Applicants select the school they desire to attend as they develop their career plan. Applicants must document with their application the school's tuition, book costs, and other fees. ERS will also review the school choice. PEF reserves the right to deny any application based upon the school selected.

### **Credit Reporting**

As a general policy, no credit reporting or legal action will be taken if students are behind in their repayments. However, the standard promissory note has been prepared under the direction of legal counsel so that it could be enforceable in a court of law if necessary. If an Area PEF Committee feels that there have been egregious abuses within their Area, they may request approval to take legal or credit reporting action. This request must be approved by the PEF Loan Committee before any additional steps are taken.

## **PEF Service Centers**

In selected areas around the world, PEF Service Centers are established. Trained staff, including Church service missionaries, serve here to support and supplement stake specialists in contacting PEF participants via telephone, email, text messages, or other means. PEF Service Center staff and stake specialists provide encouragement and inspiration to participants, track their status with school and work, and help them resolve payment issues. Information gathered is provided to area and local leaders to help participants succeed.

PEF Service Center staff and volunteers use the PEF System to track and sustain participants, along with associated software applications that record participant contacts, manage surveys, and provide other resources.

These service centers are directed by capable staff members, including Church service missionaries, who oversee, schedule, and train those who are contacting the participants. The PEF Website provides helpful training and video demonstrations. The PEF director of operations at headquarters is responsible for overall support and initial training for PEF Service Centers worldwide. Local PEF Service Centers are directed by their respective Area PEF coordinators. Daily training and operations are supervised by PEF service center supervisors under the direction of the Area PEF Coordinator.

PEF Service Centers also serve as a help desk and can be contacted by participants using a toll-free telephone number or via email. Before a PEF loan is activated, participants call the appropriate PEF Service Center for an initial loan interview.

## **PEF Website and PEF System**

Available on the World Wide Web at [www.lds.org/pef](http://www.lds.org/pef), the PEF Website and PEF System provide the key information necessary to prepare and sustain participants and train and inform all involved. They are developed at PEF headquarters and used daily by all involved in each area. Provided are the following tools and activities:

General information about PEF, including purposes, principles, requirements, success stories, how to donate,

how to apply, and more

Participant Progress Reports for every PEF participant, including school, work, loan status, and contact information

The online PEF participant application

Reports for priesthood leaders showing the status of each participating member

Instructions, action lists, and other tools for ERS, S&I, and finance personnel

Reports for the Area PEF Committee

Interactive training for all, including video demonstrations and other materials

## **Stake Specialists**

Stake specialists may be called to coordinate PEF service in a stake. Often PEF responsibilities may be added to existing stake employment specialists. Stake specialists have four specific PEF responsibilities: (1) guide applicants to the PEF Service Center for help with the PEF application, (2) contact and assist PEF participants monthly, (3) update PEF participant status in the PEF System, and (4) report regularly to priesthood leaders.

## **Training and Evaluation**

The PEF director of training and communications works closely with other PEF directors and members of the executive committee, including their respective training staffs. Together, they prepare initial and ongoing training materials and processes. They may also design and implement evaluation efforts, augmented by the Research and Information Division of the Church. Training and evaluation programs are provided for headquarters staff and those in the areas. Training in the areas is coordinated through the Area PEF Coordinator.

PEF Training, accessed via the PEF Website, provides interactive, video-based instruction in PEF principles, processes, roles, responsibilities, and other key aspects of the program.

# Communication Services

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## Digital Media Guidelines

### Executive Summary

Updated: January 2014

These guidelines are to be used to request approval for Church websites or social media resources. Social media resources include Facebook, YouTube, Twitter, blogs, etc.

Note: this guideline is limited to external or publicly accessible websites and social media resources.

### Preface

Each year the Church produces hundreds of products and messages. Without oversight, these messages and their distribution can easily become overwhelming and duplicative. To oversee Church digital messaging and distribution, the First Presidency formed the Communication Services Committee (CSC) and commissioned the members of that committee to help Church departments and entities convey the Church's message to the world, conserve resources, and stay alert to new opportunities. Thus, the CSC reviews each department's requests for digital media resources to ensure that all Church-produced messages and their distribution support the purposes, priorities, and programs of the Church as defined by the Brethren. Digital media resources include content, domain names, websites, web applications, social media properties, and mobile applications. CSC review must be performed even if the initiative was included in the annual plan (or if a significant change is made to an existing product or digital resource, such as redesigning or changing the purpose of a website).

The CSC's review and approval of Church digital media resources are part of a joint effort with the Correlation Department. The CSC tracks the impact of content, programs, and materials on members' time and money, and the Correlation Department helps ensure compliance with Church intellectual property, visual identity, and privacy laws and regulations. Furthermore, the CSC reviews and approves only public-facing or

member-facing digital media resource requests, while the Correlation Department reviews and approves all requests for Church products, programs, and messages, including department materials for general use in all formats—printed, Internet, video (broadcasts), and digital resources.

Step-by-step instructions for reviewing project requests with the CSC and Correlation can be found here: [http://cor-ipd.ldschurch.org/?page\\_id=2527](http://cor-ipd.ldschurch.org/?page_id=2527).

### Publishing Guidelines

Those who are publishing content through digital channels should specifically identify the best practices used for determining (1) primary and secondary audiences, (2) appropriate voice and tone for the intended audience, and (3) relevant research methodology when selecting distribution channels for the intended audience. Some best practices include:

- Understand why a particular piece of content should be created and shared.
- Anchor content to the core gospel principles and words of living prophets to most effectively reach those who seek to follow Jesus Christ.
- Focus on creating relevant and personal content that the intended audience will want to and be able to share easily.
- Provide content that is relevant and timely (e.g., a local or current event).
- Use an authentic, active voice that the intended audience can emotionally relate to (imperative or interrogative in the second person) rather than a formal, passive voice (declarative, exclamatory in the third person) when writing.
- Eliminate unnecessary words (e.g., *a number of* vs. *many*, *for the duration of* vs. *during*) and anything that may be cryptic or unclear that the general public would not understand (e.g., technical or internal Church jargon).
- Use short, simple sentences and familiar words that

sound natural when read aloud.

- Use appropriate visual imagery consistent with guidelines.
- Remember search engine optimization (SEO) best practices, especially with regard to tagging images and text.
- Follow escalation guidelines for posts or comments that may be threatening to a particular person or organization (i.e., notify your manager and Church Security of nefarious activity).
- Consider content language and translation needs (for both text and images) as most digital media reaches across cultural and language boundaries.
- Consider how the Brethren would feel if they were to see the published content. (Keep in mind that the Brethren may not be the intended audience.)
- Avoid political campaigning.
- Do not identify or post pictures of employees, vendors, customers, missionaries, office equipment, or surroundings without approval from the responsible data steward or the person to whom the information or image pertains.
- For more information about general employment use of digital resources, see <https://policypoint.ldschurch.org>.
- Recognize that information published on social media properties should first be classified as *public*. Never disclose confidences over digital media. (*Public* is defined as information formally approved for public release that must be protected at its official source against loss or change. Such information includes the scriptures, curriculum materials, news releases, and official information about the Church and its doctrines. For more information about data classifications, see <https://policypoint.ldschurch.org>.)

## Social Media Escalation

Comments that make claims or threats to hack, attack or disrupt Church web proprieties, LDS.org, Mormon.org, etc., or social media sites should be reported. Included might be comments, claims, or

threats to obtain Church Information such as membership records, financial records, temple records or information about Church leadership or comments that claim to have access to insider information or sources. If in doubt, please report your concern. There is no harm in over reporting.

Keywords might include:

- Hacking
- Cracking
- Attacking
- Data
- Computers
- Denial of Service (DOS)
- Distributed Denial of Service (DDOS)
- LDS account
- Passwords
- Insider
- Sources
- Whistleblower

Concerning social media comments related to computer and information security should be reported by emailing [SECOPS@ldschurch.org](mailto:SECOPS@ldschurch.org). Please include in the email a copy of the related social media comment including screen name, time stamp and social media property. You can also contact security operations by phone (801)-240-1919. Someone is available 24/7.

## Administering Social Media Profiles and Accounts

Those who request approval to create and manage social media profiles and accounts should be aware of the administrative support required for maintaining and protecting them. All social media profiles intended for Church use are to be created and registered by the Intellectual Property Division of the Correlation Department (see Social Media Profiles and Accounts Notice at [http://cor-ipd.ldschurch.org/?page\\_id=2632](http://cor-ipd.ldschurch.org/?page_id=2632)). Those who have direct access to publish content (i.e., those who know the username and password) should be

kept to a minimum (i.e., certainly more than one, but not more than three or four).

Those who publish or moderate content should only access accounts through centralized and approved tools (currently *Adobe Social* for social media accounts, polling, or live-streaming apps). Exceptions to centralized administration of user accounts are reviewed case by case. The Publishing Services Department can assist with account management needs. Some best practices for administering profiles include:

- Grant username and password access through Church-approved solutions (e.g., Adobe Social). The Publishing Services Department can advise on the appropriate administrative tool.
- Follow current Church policies for password strength. For more information, see <https://policypoint.ldschurch.org> or <https://apps.ldschurch.org/sites/itsecurity>.
- Adjust built-in settings to automatically filter profanity and censor other inappropriate content.
- Do not allow users to post to Facebook or Google+ pages. Users may comment on posts published by the Church, but they should not create posts themselves.
- Designate one or more moderators to consistently review social media posts. Review frequency will depend on the individual resource or account but should be no less than twice a week.

## Measuring Performance

As a general rule, the success of content published through the web, mobile, or social media resource should be defined at the onset and measured over time. Digital media provides unique advantages to test and tune content so that it effectively resonates with the intended audience. Some common units of measure include:

- Click-through—how frequently people click on the content to learn more.
- Reach—the number of people who read or viewed your content in a given time period.
- Engagement—the number of individuals who interacted with your content in a given period of time

(e.g., likes, retweets, and +1's).

- Audience growth—the change in number of individuals following your account over a given time period.
- Resonance—the degree to which people are responding to your comments by sharing it with others.
- Perception—the sentiment or feeling toward a particular piece of content.

# Correlation Intellectual Property

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## Executive Summary

The First Presidency and Quorum of the Twelve have assigned Correlation Intellectual Property the responsibility for all data privacy matters of the Church. The Data Privacy Office in Correlation Intellectual Property assists Church departments and organizations to develop and implement policies and procedures that will safeguard personal information used by the Church in compliance with applicable data privacy laws.

## Data Privacy Statement

The following statement summarizes the activities of The Church of Jesus Christ of Latter-day Saints and its affiliated entities (collectively referred to as “the Church”) regarding the collection, maintenance, use, and transfer (collectively referred to as “processing”) of personal information.

1.The Church processes general and sensitive personal information about Church members. Personal information is usually collected directly from the Church member (or his or her parent, if a minor). Personal information may also be collected from ecclesiastical leaders or other official sources.

2.Personal information is processed to: (a) create and maintain Church membership, donation, historical, and genealogical records; (b) evaluate eligibility to participate in temple and other ordinances, missionary service, and volunteer and leadership positions; (c) administer Church religious education, welfare, or other Church programs; and (d) contact individuals for Church-related purposes.

3.The provision of personal information is voluntary. When providing personal information about anyone other than himself or herself, the Church member will obtain the other person’s consent and provide that person access to this Data Privacy Statement. This requirement does not apply where parents provide personal information to the Church on behalf of their minor children.

4.To protect the confidentiality of processed personal information, the Church uses technical and

organizational measures appropriate to the sensitivity of the information. Access to confidential or sensitive personal information is restricted to authorized Church officials and personnel. As local law may permit, certain general personal information (names, addresses, telephone numbers, and e-mail addresses) may be distributed to Church members within the same ward/branch or stake/district.

5.Personal information may be transferred to Church entities located both in the United States of America and in other countries where more or less demanding data protection laws may prevail.

6.Upon written request and if local law so requires, individuals may be allowed to access their personal information, to specify that their personal information be corrected or updated, or to oppose processing of their personal information. Ward or branch clerks can provide general personal information to members and can advise members where to send written requests to access other personal information.

7.The Church retains personal information only as long as necessary for the purposes outlined in this statement. Some information is retained indefinitely as part of permanent genealogical, membership, historical, and other records.

Inquiries concerning this Data Privacy Statement or the safeguarding of personal information processed by the Church should be sent by e-mail to [DataPrivacyOfficer@ldschurch.org](mailto:DataPrivacyOfficer@ldschurch.org).

## Personal Data Protection

### Introduction

The Church of Jesus Christ of Latter-day Saints (“the Church”) is committed to safeguarding personal information and complies with applicable information protection laws, while at the same time protecting personal information or records considered sacred, confidential, private, or otherwise restricted for legal, ethical, or religious reasons.

The Church collects and processes personal



information from members and other persons affiliated with the Church to (a) create and maintain Church membership, donation, historical, genealogical, or employment records; (b) evaluate eligibility to participate in temple and other priesthood ordinances, missionary service, and volunteer and leadership positions; (c) administer Church religious education, welfare, or other Church programs; and (d) contact individuals for Church-related purposes.

The Church uses personal information collected from individuals online to fulfill the individual's request, seek voluntary feedback on website features or content, personalize the user's experience, and protect Church systems and users from harm. Information is also collected and processed for internal auditing, information analysis, system troubleshooting, and research purposes.

### **Scope**

All personal information provided to the Church is protected by security measures to minimize, by means of preventative security measures, the risk of accidental or intentional loss, unauthorized access to the information, or processing operations that are either unlawful or inconsistent with the purposes for which the information has been collected.

By implementing appropriate security measures, the Church strives to ensure that (a) only authorized individuals can access, alter, disclose, or destroy personal information; (b) individuals are allowed to act only within the scope of their authority; and (c) if personal information is accidentally lost, altered, or destroyed, it can be recovered to prevent damage or distress to the individuals concerned.

### **Definitions**

*Personal Information*—Any information that can be used to identify a person; may include sensitive personal information.

*Sensitive Personal Information*—Information that reveals an individual's political opinions, religious views, philosophical beliefs, ethnic or racial origin, health conditions, disability information, genetic information, information relating to sexual life, trade-union membership status, or similar information.

Sensitive Personal Information may also include national identification numbers (e.g., Social Security numbers in the United States), financial information (e.g., credit card information, bank account numbers) and driver's license numbers.

*Processing*—Any action taken that affects personal information, including collection, recording, storage, transferring, organization, alteration, disclosure, or erasure.

*Church Systems*—Systems, applications, databases, or other similar resources or methods used to process personal information.

### **Summary of Church Information Security Policy and Standards**

The Church strives to keep personal information secure by implementing reasonable security measures appropriate for the type of information and the harm that might result from its improper use or accidental loss or destruction.

Paper documents containing personal information are to be kept in locked drawers or file cabinets when not in use (exceptions may be made for directories or notes containing general information such as personal contact information). Unique usernames and passwords are used to restrict access to Church systems that process personal information. Individuals with access to personal information are to become familiar with and follow the security levels of protection outlined in this policy.

Existing Church systems that process personal information have been inventoried to determine what types of information they process. New Church systems should be inventoried during their initial development. Periodic reviews of Church systems ensure that security safeguards have been implemented and are appropriate for the system's security classification. Information and Communications Systems (ICS) is responsible for the inventory of high risk Church systems and for identifying appropriate levels of security for all Church systems.

Electronic and hard-copy personal information are classified as belonging to one of the security protection levels listed below. Church systems are to adopt at least

the basic security protection outlined.

## **Security Levels of Protection**

### **Basic Security Protection**

Basic security protection includes security measures that ensure at least a minimum level of personal information protection. Basic security measures include:

- *Maintaining Information Inventories.* The inventory identifies the source of the data and the types of data on the systems.
- *Authenticating Systems.* Individuals authorized to access the systems are assigned computerized authentication credentials (usernames and passwords). An updated list of people authorized to access Church systems indicates the specific information and Church systems that each person can access.
- *Using Unique Usernames.* Usernames are unique for each authorized individual.
- *Deactivating Credentials.* Usernames and passwords are deactivated immediately for any person that is disqualified or is no longer allowed to access Church systems.
- *Controlling Access.* Controls are in place to limit the number of attempts a person may make to gain access to Church systems. Repeated unauthorized access attempts are blocked.
- *Managing Computer Components.* Only personnel authorized by a supervisor may access hardware and computer components for Church systems. Physical access to locations where Church systems are housed is likewise restricted to authorized individuals.
- *Moving Personal Information Securely.* Moving personal information from Church systems must be authorized. Security measures are adopted to prevent loss or unauthorized access of personal information when it is transported or moved outside its physical location.
- *Disposing of Information Properly.* Personal information must be disposed of in a secure manner that ensures that the information cannot be retrieved or reconstructed. Examples include shredding hard

copy records and degaussing digital records.

- *Reporting of Security Incidents.* All information security incidents are reported to the Church's Global Service Center. Reported incidents are managed by the Church Incident Response Team. Incident reports should include the date of the incident, the time of the incident, the name of the person giving notice, the information and system involved, and the severity of the incident.
- *Having Backup and Recovery Procedures.* Emergency procedures, including manual fallback plans and resumption plans, are in place so that they can be implemented to restore operations and ensure the availability of personal information. These plans are tested periodically.

### **Medium (Moderate) Security Protection**

Medium security protection includes measures for Church systems containing sensitive personal information, including administrative or criminal sanctions and other employee organizational and personal information, tax and employee withholding information, organizational directory or group contact information, customer or vendor lists, information about financial institutions, pension or similar social security program group details, and similar information. In addition to the requirements of the basic security protection outlined above, medium security protection should include:

- *Authenticating Systems.* Authentication credentials for individuals must be deactivated in accordance with Church policy if they have not been used within a reasonable period of time. Individual's rights to retain system access is regularly verified.
- *Monitoring and Enforcement.* Church systems that process sensitive information are reviewed at reasonable intervals based on the level of sensitivity. Reviews will also take place when Church systems are modified and the modifications are deemed to have an impact on security measures. Either an employee or an independent party may conduct the review and provide a written report. The report indicates the adequacy or deficiencies of the system's security measures, as well as alternative measures that should be implemented to the system's security.

It must also include the information on which the report was based. The report is reviewed by the person(s) responsible for the security of Church systems, who will then issue a final report to the Data Privacy Office.

### **High Security Protection**

High security protection includes measures intended to protect certain sensitive personal information, including personal health information; information about health and sex life; national identification numbers (Social Security or similar numbers); personal donation, compensation, or pension details and bank account information; and select ecclesiastical leader personal details. In addition to the basic and medium security protections, high security protection should include:

- *Maintaining Information Inventories.* An inventory of the name(s) of individuals responsible for the security of high risk Church systems is maintained.
- *Encrypting Information.* Certain sensitive information is encrypted or protected by technical means to make it inaccessible to unauthorized persons. Sensitive personal information processed through portable devices must also be encrypted. Processing of sensitive personal information through portable devices that do not support encryption should be avoided whenever possible. If such processing is necessary, appropriate measures are adopted that take into account the risks of processing information in unprotected locations.
- *Authenticating Systems.* The names of persons accessing Church systems and a record of access attempts are maintained in accordance with ICS Church policy. Significant incidents are reported to the Church Information Security Officer indicating any access problems that have been detected.
- *Having Backup and Recovery Procedures.* A backup or recovery copy of Church systems is stored outside the site where the Church systems are located. The copy is to be protected by all the above required security measures. Backup or recovery copies of Church systems are created on a regular basis.

### **Test Information**

Real personal information may be tested on Church systems only when appropriate information security standards are in place. This restriction applies to Church departments, outside vendors or processors, and any other party. Appropriate security standards may include, without limitation, signed confidentiality agreements, outside vendor agreements, and security controls designed to protect the information from inappropriate use or access.

### **Information Processors**

Church departments or local leaders may share personal information with a third-party information processor only if the Church has a written contract with the information processor. The written contract must include provisions for appropriate security and other information protection safeguards and reasonable steps to be taken to ensure the information processor has implemented suitable technical security and organizational measures. Where legally necessary, the prior consent of individuals will be obtained before sharing their data with any third party.

### **Physical Security**

Local unit Church computers used for processing membership information should be configured so that users are discouraged from installing unauthorized software. Such computers are to be used only in accordance with Church policy.

Access to Church facilities must be controlled with a combination of locks and keys, access card readers, or physical gate access depending on the risks associated with that facility.

Church data centers must maintain adequate temperature and ventilation.

Data centers that store hardware for personal information processing are to be equipped with mobile fire extinguishers or chemical fire suppression systems, or both.

Exterior doors to data centers or areas with Church systems and databases must be equipped with alarms or a common lock.

High-risk Church systems are operated in a secured, trusted environment.

## **Security Policy Document**

The Church information security policy and associated information security standards documents contain specific requirements for physical security, access control, system development, infrastructure configuration, system testing, vulnerability testing, system logging and monitoring, and network configuration. Security requirements are reviewed regularly to ensure that they are adequate for the sensitivity level of the data being protected. This policy document is also reviewed regularly to ensure it is current with industry standards. All security protection provisions outlined in this document will be reviewed at reasonable intervals to ensure that they comply with any changes in information protection laws and regulations.

### **Effective Date**

This version of the policy became effective on March 28, 2014

# Records Management

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## Definition of Records Management

Records management is the care and control of records throughout their life cycle.

Records are defined as all information, in any medium, created or received by a Church employee or officer in connection with the transaction of Church business.

## Statement of Purpose

The Church creates or receives, maintains and uses, and then disposes of or preserves a variety of records used in Church operations. Records Management works to ensure that:

All Church employees, missionaries, and officers understand their record-keeping roles and responsibilities and know where to obtain assistance.

Records of enduring value are properly archived.

Supporting systems and tools are easy to use.

## Goals of the Records Management Program

The Records Management program provides clear record-keeping direction, guidance, and resources to Church departments and entities, enabling individuals throughout the organization to manage records.

The program helps individuals effectively manage Church records by providing:

Training.

Consultation.

Record Center services.

When needed, Records Management partners with Information and Communications Services (ICS) to provide technical solutions for managing records.

## Reasons for Managing Records

Efficiently managing Church records allows

departments and other Church entities to optimize their effectiveness. Benefits include:

Locating needed records more easily and quickly.

Reducing operating costs.

Enhancing legal compliance and decreasing risk.

Preserving the history of the department or entity.

## Records Management Program Governance

The Records Management committee governs the Records Management program. The committee is chaired by the Church Historian and Recorder, who reports to the First Presidency.

### Records Management Committee

Members of the Records Management committee include representatives from the Church Historian and Recorder's Office, the Presiding Bishopric, the Office of General Counsel, Information and Communications Services, and Finance and Records.

The Records Management committee has the following responsibilities:

Set the direction and priorities for the records management program.

Provide executive support.

Grant approval of principles, policies, and program goals.

Review the status of the Records Management program.

### Records Management Working Group

Members of the Records Management working group include but are not limited to representatives from Member and Statistical Records, the Office of General Counsel, Records Preservation, Information Security, Data Privacy, Intellectual Property, the Church Controller's Office, and Correlation.

The Records Management working group reports to the Records Management committee. Their responsibilities include the following:

Working through policy issues.

Addressing ongoing needs of the Records Management program.

Conducting “best practices” research.

Making recommendations to the Records Management committee.

## **Department Governance**

Department heads and Area Presidents are accountable for managing the records within their jurisdiction. Departments should appoint a records coordinator to oversee records management within their department. Department controllers are typically appointed as the records coordinator. Records coordinators may assign assistant coordinators as needed. It is recommended that area offices also assign a records coordinator.

## **Retention and Disposition Schedule**

The Records Management program maintains a retention and disposition schedule that lists the categories of records held by the Church, their retention (how long a record should be kept), and their disposition (whether a record is archived or destroyed once it has passed its retention date). The retention and disposition schedule should be followed unless a business need or local legal code requires an exception. Local legal counsel must be consulted and the Records Management committee must approve all exceptions to the retention and disposition schedule.